University of Alberta

Recruitment, Socialization, and Retention of Principals in Alberta's Rural Schools

by

Carl James McColl

A thesis submitted to the Faculty of Graduate Studies and Research in partial fulfillment of the requirements for the degree of Doctor of Education

in

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The undersigned certify that they have read, and recommend to the Faculty of Graduate Studies and Research for acceptance, a thesis entitled **Recruitment, Socialization, and Retention of Principals in Alberta's Rural Schools** submitted by Carl James McColl in partial fulfillment of the requirements for the degree of Doctor of Education.

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Dedication

I would like to dedicate this dissertation to my mother, Lorraine McColl. Her unceasing whispers of encouragement have helped to provide me with the desire and strength to achieve this final degree. She has always expressed her support for my endeavours and her everflowing reassurance, "Just remember son, your mother loves you," has nurtured me through moments of morosity and doubt. Thanks, Mom!

Abstract

School jurisdictions across North America have been experiencing difficulty hiring qualified principals for their schools. Demographic trends coupled with reform initiatives seem to have contributed to a decline in the quantity and quality of candidates for the principalship. Within rural Alberta in particular, superintendents have indicated that the quantity and quality of applicants were decreasing, the number of experienced principals wishing to resign their positions was increasing, and the number of vice-principals wishing to apply for principalships was decreasing. The purpose of this study was to identify and describe strategies that would ensure that Alberta jurisdictions continue to have qualified principals in their rural schools. During two sets of semistructured interviews, 10 rural educators in leadership positions utilized their knowledge of the current rural-school reality and offered suggestions for the recruitment, socialization, and retention of future Alberta rural-school principals.

Analysis of these responses revealed the following themes: (a) The work-life landscape of rural-school principals is both onerous and unique and has a direct effect on a jurisdiction's ability to recruit, socialize, and retain rural principals; (b) a jurisdiction's ability to recruit and retain future rural principals is directly related to a its ability to make the rural principalship attractive; (c) recruiting qualified people with a positive disposition toward rural schools is likely to facilitate better socialization and retention of future rural-school principals; (d) future rural principals will require considerable preservice and inservice professional development, socialization, and training; and (e) a supportive learning-community environment would not only enhance the socialization of future rural-school principals but would likely be attractive as well.

Participants suggested methods to help future candidates appreciate the rural-school principalship by emphasizing and celebrating attractive aspects of the rural-

school culture. They proposed measures to compensate for the decrease in the quantity of qualified candidates and increase in experienced principals wishing to resign their positions by identifying and socializing principalship candidates from within rural schools, by providing incentives, by providing conditions that sustain the appeal of the position, and by changing aspects of the rural-school principalship that made the position unattractive.

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CHAPTER 1

Introduction to the Study

Coming to the Question

I first became interested in undertaking research on the recruitment, socialization, and retention of principals in the spring of 1997 while attending a district administrators' planning meeting and discussing the implications of school-based decision making. One of the decisions we debated was the advantages and disadvantages of budgeting for the actual cost of professional staff versus a district average per-teacher cost. I quickly discovered, because of a large number of senior teachers on my staff, that an average per-teacher cost was certainly more beneficial for my school. This discovery led me to become curious about the age demographics of teachers and administrators in my jurisdiction. Upon examining the statistics, I found that by the year 2007 approximately 50% of the teaching staff, 75% of school-based administrators, and 100% of central office administrators will have reached the 55-year benchmark and could be eligible to retire. In addition, because I had always taught or had been an administrator in rural Alberta schools, I had strong feelings about the way that these often smaller, multidivision schools operated and were administered. Thus, having some knowledge about the intricacies of being a rural administrator, I began to ponder where and how rural Alberta jurisdictions would find administrative leaders to replace those who were about to retire. Would qualified people be willing to accept a rural-school assignment? Would they be prepared for their role? Who would be responsible for preparing them? Would they stay? Thus began my quest.

Changing Demographics

An analysis of the 1997-1998 demographics of school-based administrators in Alberta indicated that an astounding number of school leaders would be eligible to

retire in the very near future. Based on those 1997-1998 school-year statistics, by the year 2010 approximately 1,400 principals and 950 vice-principals will have reached the age of 55 (B. Pederson, personal communication, October 14, 1998) and may be eligible for retirement. The implications of this demographic trend had already begun to manifest itself in 1997 as indicated within a study prepared for the College of Alberta School Superintendents (CASS). Within that study, Eckstrom and Fischer (1997) discovered the following significant points:

1. Jurisdictions strongly agree that the quantity of applicants was decreasing.
2. Small urban and rural districts noted that the quality of applicants was decreasing.
3. The number of experienced principals wishing to resign their positions was increasing.
4. The number of vice-principals wishing to apply for principalships was decreasing.

Because the results of this study were most significant in rural jurisdictions and small schools, Eckstrom and Fisher (1997) reported that Alberta superintendents were not satisfied with the quantity or the quality of the candidate pool for administrative positions. Within research reported at about the same time, Thomas (1997), who studied the selection and evaluation of school principals in Alberta, also reported similar findings.

In British Columbia the trend was similar. Bognar and Associates (1997), in a survey prepared for the British Columbia Principals' and Vice-Principals' Association and the British Columbia Public School Employers' Association, discovered that "school districts had a declining pool of candidates from which to choose administrators" (p. 8), and interestingly, "school districts [received] the fewest applications for elementary principalships, where the greatest number of retirements [was] expected" (p. 18).

A "shortage looms" in Ontario, as was announced within a report compiled from the Ontario College of Teachers registry. McIntyre (1998) stated that "78,000 of the College's 171,500 members [would] reach retirement age over the next 10 years" (p. 10). Although recently legislated out of the College of Teachers, principals and vice-principals were already feeling the effects of this impending shortage. In one school jurisdiction alone there were 22 schools without vice-principals as of February 1999 (L. Hossack, personal communication, 1999).

In 1998 more than 60% of Saskatchewan principals were eligible to retire in the next 10 years (Canadian Association of Principals, 1999). Within a 1998 report on the worklife of principals prepared by the Saskatchewan Teachers' Federation Research Unit, the researchers stated that key issues for the future would be the recruitment and retention of rural-school principals. In their words:

Two over-riding and closely related questions that were raised by the research results:

> 1. What structures, supports and processes are needed to ensure that the principalship will continue to be a rewarding and desirable profession?
>
> 2. What structures, supports and processes are needed for the recruitment and retention of principals, particularly for schools located in rural areas and the north? (p. 61)

International Perspectives

Our neighbours to the south were experiencing a comparable challenge. Farrace (1997), in a recent edition of the *Newsleader*, the publication of the National Association of School Principals, described the magnitude of the problem: "Without regard to region or to a district's socioeconomic level, the pool of qualified applicants for principals' positions is rapidly evaporating, an issue reaching crisis stage for educational leaders nationwide" (p. 2).

The pending scarcity of both teachers and principals in Alberta was being foreshadowed by shortages in other countries. In Germany, as reported by Brakeman (1995), the headteacher (school administrator) shortage had been predicted three years previously. As reported in Britain's *Times Educational Supplement (TES)* (Brakeman, 1995), "More than 10,000 of the country's 53,000 headteachers are due to retire over the next 10 years" (p. 15). The teacher shortage seemed to have already reached crisis proportion there. As Pyre (1997) noted in the May 1997 *TES*, "The gathering recruitment crisis [was] now worse than in the economic boom years of the 1980s and the Government has been warned that the lack of good staff could destroy its plans for turning round failing schools" (p. 3). At the same time, school administrators in Britain were in such demand that advertisements for headship positions had increased dramatically. Pyre pointed out that "advertisements in the *TES* for the first four months of the year [showed] headship vacancies at 40 percent above last year for primary and nearly 60 percent higher in the secondary sector" (p. 3). By September 1997, as reported by Sears (1997) in *TES*, British school boards were beginning to look for and hire substitute headteachers (principals): "The shortage of headteachers is now so severe that for the first time supply teacher agencies are providing stand-ins" (p. 8). This crisis in Britain continued, as Barnard (1998) indicated in the September 1998 *TES* headline of an article referring to the scant supply of headteachers: "Shortage of heads worsens" (p. 1).

Educational Reform

To "add fuel to the fire," education in Alberta was in a period of transformation. Financial reform, district governance modifications, new roles and responsibilities, school councils, site-based decision making, site-based management, the implementation of a plethora of new curriculum, technology integration, the Freedom of Information and Protection of Privacy Act, and the reorganization of

Special Education were all recently introduced changes in the Alberta context. All of these changes had considerable impact on the role of a principal. Alberta superintendents, especially those in rural jurisdictions, indicated that these changes had considerable impact on rural and small-school leadership and that the amount of time devoted to educational leadership was decreasing (Eckstrom & Fisher, 1997).

Purpose of the Study

Within this context, the goal of this study was to develop an understanding of what might be required to ensure that Alberta school jurisdictions continue to have qualified candidates willing to accept and then remain in rural-school principalship positions. In other words, the purpose of this research was to identify and describe possible recruitment, socialization, and retention strategies to ensure that this occurs. The focus of this research was not on *whether* these strategies would be necessary, but on *what* strategies would likely be necessary to ensure that Alberta's jurisdictions continue to find, prepare, and keep skilled principals in their rural schools.

Research Questions

This study was based on three foundational research questions. They were as follows:

1. What strategies will be required to recruit qualified people to rural-school principalship positions?

2. What would be considered exemplary methods to socialize future rural-school principals into their leadership role?

3. What might be necessary to encourage future rural principals to stay in their rural-school administrative positions and remain within their jurisdictions?

Assumptions

This study was based on the following four assumptions:

1. The nature of school administration in the near future will include a person assigned as principal of each rural school.

2. The person in the position of principal will continue to require an Alberta Teaching Certificate.

3. Alberta local school jurisdictions will continue to operate rural schools.

4. Alberta school jurisdictions will experience a shortage of qualified applicants for their rural-school principalships.

Definition of Terms

Rural school. A rural school is one that is located beyond the established limits of communities that do not have a population greater than 10,000 (official population list as compiled by Alberta Municipal Affairs, 2000). Specifically rural schools are those schools that do not have mailing addresses within the following communities: Airdrie, Brooks, Camrose, Canmore, Calgary, Cold Lake, Edmonton, Fort MacMurray, Fort Saskatchewan, Grande Prairie, Leduc, Lethbridge, Lloydminster, Medicine Hat, Red Deer, Spruce Grove, St. Albert, Sherwood Park, and Wetaskiwin.

Leadership. The concept of leadership is elusive, as Leithwood, Jantzi, and Steinbach (1999) indicated in the introduction of their book *Changing Leadership for Changing Times*.

> So there is no final word on what is good leadership. We are simply trying to hit a moving target; maybe even get a little ahead of it. Granted the qualities that are relatively enduring may become clearer in the process, but these qualities will never be more than the "basic skills" of leadership. They will never tell us anything important about how to exercise outstanding leadership, because outstanding leadership is exquisitely sensitive to the context in which it is exercised. (p. 4)

The hermeneutics of whether future school leadership is dubbed effective, efficient, productive, outstanding, or simply good is not an urgent concern in this study. Nor is this research concerned with the classification of future approaches to leadership (contingent, instructional, managerial, moral, participative, transformational, or even post-transformational) (Leithwood et al., 1999) and all that these labels may imply. What is being asserted here is that whatever type or form of leadership emerges, the principal of the rural school will play a fundamental and crucial role in providing it.

Work-life landscape. The landscape metaphor has been used to describe the work life and workload of a rural-school principal. The metaphor itself was derived from a description of a teachers' professional knowledge landscapes (Clandinin and Connelly, 1995) and speaks about "space, place and time, [and] it has a sense of expansiveness and possibility of being filled with diverse people, things, and events in different relationships" (Clandinin and Connelly, 1995, p. 4). The work-life landscape of a rural-school principal is composed of a wide variety of components and influenced by a wide variety of people, places, and things (Clandinin and Connelly, 1995, p. 5).

Resident principal. A resident principal is one who resides within the attendance boundaries of the rural school.

Non-resident principal. A non-resident principal is one who resides outside of the attendance boundaries of the rural school.

Multidivision school. A multidivision school is one that is comprised of students from more than one division (elementary, junior high, high school). Examples of multidivision schools are those containing grades K – 9 or K – 12.

Significance of the Study

There will be an urgent need for principals to meet the challenging and ever-changing nature of schools in the future. Leithwood et al. (1999) explained: "'Times

change,' and productive leadership depends heavily on its fit with the social organizational context in which it is exercised. So as times change, what works for leaders changes also" (p. 3). The concept of leadership *has* changed. Students, teachers, parents, and community all bring radically altered, often incongruent (if not incompatible), expectations to our schools (Leithwood et al., 1999).

Recent demographic trends, together with superintendent-expressed concern, have indicated that jurisdictions will likely be searching for qualified people to assume leadership positions in Alberta's schools. This appeared to be especially significant for rural schools. The significance of this research is that it addresses a critical need within the province. This study gathered and presented a compilation of strategies for recruiting, preparing, and retaining future leaders in the rural-school principalship which may assist Alberta school jurisdictions and the Alberta Department of Learning in the development of procedures for the future.

CHAPTER 2

Literature Review

Although 15 years before the completion of this study, Peterson's (1986) prediction still seems appropriate to the Alberta context. He indicated that the people running our schools would have to be "those selected, socialized, and trained in the next half decade" (p. 151).

Although in reality there is no clear demarcation between recruitment, socialization, and retention, scholarly writers have separated the three; and I, consequently, present a review of studies and readings in the same manner. What follows is a review of literature related to the recruitment of principals, the nature of socialization of these principals into and within their positions, as well as the complicated task of encouraging these recruited and socialized rural-school principals to remain within their jurisdictions and remain in school-based administrative positions. In some cases I refer to literature from the business world where parallels to education exist.

Recruitment

Introduction

In recent memory, the recruitment of school leaders has been a relatively easy task for Alberta school boards. There have usually been numerous internal and external applicants aspiring for the available vice-principal, principal, and central office positions including the superintendency (Oaks, 1986). This plenitude of eager applicants was changing, however, as both the quantity and quality of applicants for school administrative positions were decreasing, especially in smaller schools and rural jurisdictions (Eckstrom & Fisher, 1997). The average age of school administrators was increasing (B. Pederson, personal communication, October 14, 1998), and the

projection was that there would soon be numerous administrative positions available. Simply put, there were a greater number of administrative positions available and fewer qualified candidates for those positions. School jurisdictions in Alberta were faced with supply/demand issues and were beginning to pay special attention to their recruitment policies and practices.

The recruitment of principals is a complex task that requires considerable thought and planning. The following factors that influence the recruitment process have been reviewed within this section: methods that jurisdictions utilize to recruit their principals, selection of applicants from a limited talent pool, and the nature of the principal's assignment. Also included are the deterrents to recruitment as identified in a joint NASSP and NAESP study. Finally, I have included an analysis of factors that were reported to influence the decision of physicians to locate in rural communities because some of the factors could also influence principals to choose a rural-school position.

Recruitment Practices

Castetter (1996) described the importance of the recruitment process for school jurisdictions.

> The recruitment process has the potential to attract to the school system its future leaders, career devotees, high achievers, problem solvers and innovators. Unplanned, haphazard, and casual approaches to recruitment frequently create costly personnel problems such as position-person mismatches, ineffective performance, undue supervision, absenteeism, lateness, turnover, antiorganization behaviour, unwarranted tenure and personnel litigation. (p. 87)

Castetter went on to say that recruitment cannot be viewed as the first or most important step in a school jurisdiction's personnel function, but should be considered a part of a total integrated blueprint to "implement personnel policies and previously established plans" (p. 90). The recruitment process must be future oriented and reflect the jurisdiction's strategic plan for continuous staff improvement (pp. 106-107). Once

these plans have been developed, personnel at various levels within the school district office must be "given the task of organizing recruitment activities" (p. 108). One of those activities and the next phase in the series of recruitment strategies is the development of internal and external applicant sources (pp. 114-116). Castetter continued with the suggestion that the applicant search should be carefully coordinated and a follow-up analysis of the success and effectiveness of the process should be carried out (pp. 121-123).

Research completed in Kentucky, but related to the transformational changes that have been occurring here in Alberta, indicated that principal recruitment was likely to be of prime importance. Winter and Dunaway (1997) found that

> the job of principal becomes more challenging as school reform initiatives mandate greater emphasis on instructional leadership and delegate decision making from district central offices to school sites. These changes lend increased importance to the task of principal recruitment, a process involving decisions made by applicants (e.g., decisions to apply for the job) as well as organizational representatives. Applicant decisions must be affirmative or recruitment will fail. (p. 144)

Within this research, Winter and Dunaway (1997) further examined the relationship between recruitment practices and applicant responses. They discovered and advised us that

> recruitment is a two-way process involving decisions made both by organizational representatives and by job applicants. Despite this fact, it is not unusual for administrators to focus all their attention on organizational decisions (e.g., decision to interview an applicant, decision to offer the job). This can lead to the construction of recruitment practices that may fail to stimulate applicant decisions (e.g., decision to apply for the job, decision to accept an interview, decision to accept a job offer). (p. 145)

The recent restructuring in Alberta can be related to these findings with potentially important implications for the recruitment of principals in general. A majority of jurisdictions in Alberta may have dedicated, to this point in time, most of

their recruitment energies toward developing policies that describe the needs of the jurisdiction, with little or no regard for the perspective of the potential candidates. Although this may seem to have worked well in times of an abundant supply of applicants, it is unlikely that continuing this practice will in future enable boards to recruit the most suitable, effective leaders for tomorrow. Following past practices may, in fact, have the opposite effect and influence potential applicants not to apply. "The best qualified applicants," Winter and Dunaway (1997) pointed out, "may not choose to apply for the jobs announced by organizations that employ unappealing recruitment practices, and elect, instead, to apply for jobs announced by organizations that utilize more attractive recruitment practices" (p. 145). It was interesting that the Edmonton Public School District, for example, had recently advertised provincially, using language that appealed to this reader, for "accomplished, visionary educational leaders [who were] members of a senior staff team of skilled administrators and progressive educators in an environment of school-based decision making" (Classified Ads, *Edmonton Journal*, 1998, p. I4). Competition for qualified candidates and moves from rural to urban districts had already begun at that time.

Winter and Dunaway (1997) continued to explain that "if qualified individuals do not apply for the job, there will be little opportunity to influence applicant decisions during subsequent stages of the recruitment process" (p. 145). This fact may have affected the entire process of recruitment within the province. Consequently, the demand for principals could be likened to a "seller's market" using a market economy expression—the jurisdictions' school-administrative needs and demands were high, and the school administrator applicant or candidate supply was low. The following Buckner and Jones (1990) statement seemed particularly significant:

> When compared with the time, personnel and money the business sector pours into recruiting and training candidates for management positions, the recruitment and development of school principals are meagre and haphazard.

> We must invest more time and care in assessing and developing our educational leaders, for they hold our nation's future in their hands. (p. 20)

Selection Process

Musella and Lawton (1986; as cited in Thomas, 1997) stated that "the selection of administrators and supervisors was the most important personnel decision that a school board could make" (p. 25). As well, Thomas (1997) concluded from a review of a Miskel and Cosgrove (1985) article,

> The process of selection can influence the consequences of succession on the organization. They identified two key factors that contribute to a successful transition: (a) decision-makers who are capable of rendering a decision acceptable to the candidates, the school staff and the community, and (b) an appropriate talent pool. (p. 24)

In another context, Hill and Lynch (1994) stated, regarding their commitment to locate the finest candidates for future principals in Orange County, Florida, "Vision and unique approaches are required to foster, mentor and encourage talented, dynamic people to accept today's school administrative challenges" (p. 81).

Musella (1983) developed a handbook entitled *Selecting School Administrators*. This Canadian reference began with the establishment of both long-term and short-term jurisdictional goals and priorities (p. 15). Musella's model continued with a needs assessment (i.e., student, program, staff, school, and community), a positional analysis in relation to the expectations of the district, and expectations of the school and administrative responsibilities, and is followed by an affirmative action recruitment process (with the intent of arriving at an acceptable pool of candidates). Although there seems to be a limited talent pool today (Eckstrom & Fischer, 1997), it is interesting to note that as recently as 15 years ago, Oaks (1986) indicated that there were numerous applicants for the principalship during the time of her research (p. 28).

The next procedures—developing the application forms, advertising, and collecting the applications—Musella (1983) indicated, were "rather standard" (p. 52).

The recent Winter and Dunaway (1997) article sheds a different light on these *rather standard* procedures; perhaps they are not rather standard after all. Under the heading "Data Collection and Analysis," Musella discussed and evaluated the worthiness of application forms, transcripts, references, assessment centres, personality profiles, and interviews as decision-making mechanisms for filling the vacant administrative positions. Pound and Young (1996) indicated, when discussing the reality of recent conditions,

> the selection of administrators . . . in school setting has often been viewed through a single lens. Most literature [Musella, 1983, included] . . . has been devoted to systematizing processes and procedures for screening, evaluating and selecting the final candidate. . . . However, in times of low labour supply relative to demand, candidate recruitment procedures may be more important than candidate selection procedures to secure quality employees for position vacancies. (p. 285)

Although the importance of well-developed policies has been documented in research, Thomas (1997), discovered in his Alberta study that

> fewer than one-half of school systems in the province have developed policies relevant to the selection of principals. …Despite the general level of satisfaction with current policies and practices expressed by superintendents and principals, practices currently used in the province did not compare well with those recommended in the literature. (pp. 248-250)

Role Description

Winter and Dunaway (1997) reminded us that jurisdictional recruitment procedures must take into consideration the fact that descriptions of the role of the principal directly affect the applicant pool: "Job attributes impact applicant reactions" (p. 145), and reactions were more favourable at the high school level when the job was described with management job attributes.

At the elementary and middle school levels, reactions were more favourable when the job was described with instructional leadership job attributes (Winter &

Dunaway, 1997, p. 144).Consequently, when looking at the factors that affect the recruitment of principals in general, it would be important to examine the complex nature of the job of being a school principal and the competencies that are required for the position. Historically, these competencies were examined in a 1980 University of Alberta research initiative concerning administrator competency. Entitled *Project ASK*, this study attempted to identify tasks that were important for effective performance by principals and tasks that were considered to be of "critical importance as far as effective performance in the future is concerned" (Kaida, Saunders, & Bird, 1980, p. 2). The tasks that superintendents and principals identified were organized into seven operational areas which were listed in the order of their perceived importance for the future: curriculum and instruction, school-community interface, staff personnel, resource management, pupil personnel, system-wide policy, and operations and support management. Study results indicate that both superintendents and principals felt that in the future principals would have to be very competent in providing leadership in areas of curriculum and instruction, and school-community activities.

The 1997 Alberta School Act seemed to confirm the findings of the above research by defining the principal's role in ways that would fit into the above seven operational areas, but added the dynamics that a school council (see #10) might bring to the "school-community interface" role.

A principal of a school must

1. provide instructional leadership in the school;
2. ensure that the instruction provided by the teachers employed in the school is consistent with the courses of study and education programs prescribed, approved or authorized pursuant to this Act;
3. evaluate or provide for the evaluation of programs offered in the school;
4. ensure that students in the school have the opportunity to meet the standards of education set by the Minister;

5. direct the management of the school;
6. maintain order and discipline in the school and on the school grounds and during activities sponsored or approved by the board;
7. promote cooperation between the school and the community that it serves;
8. supervise the evaluation and advancement of students;
9. evaluate the teachers employed by the school;
10. subject to any applicable collective agreement and the principal contract of employment, carry out those duties that are assigned to the principal by the board in accordance with the regulations and the requirements of the school council and the board. (1988, cS-3 s15; 1994, c29 s7)

The Alberta Teachers' Association (1998) established a Task Force on the Role of the School Administrator to "develop and promote a role definition for administrators that would reflect the profession's view of the educational leader in a collaborative decision-making model operating with a single, unified professional organization" (p. 1). Six statements were developed for the role description of school administrators that also could be categorized under the previously mentioned seven operational areas but emphasize the shared vision, and collaborative and collegial nature of the position (p. 7).

The Alberta Teachers' Association (1998) advocated that the school administrator's role is to facilitate teaching and learning by acting as

1. an educational leader who facilitates the development, promotion and maintenance of a shared vision for the school community;
2. an instructional leader who supports and ensures quality teaching;
3. a decision maker who is responsible for establishing an appropriate collaborative, shared decision-making model for the school;
4. a manager who is responsible for organizing and operating the school to ensure a safe, effective and efficient learning environment;
5. an advocate who promotes the school and public education in the community;

6. a colleague within the profession who works with teachers to provide an educational culture conducive to student learning and professional growth. (p. 7)

Aitken and Townsend (1998) investigated the role of principals since the recently instituted restructuring in Alberta and reported responses indicating that restructuring had significantly changed the principal's role and had not "resulted in overall improvement in the education system." Instead, respondents saw deteriorating working conditions and declining educational services and had concluded "that the quality of Alberta schools had worsened" (p. 5).

Deterrents

Within a joint NASSP and NAESP sponsored research project, American superintendents who felt that there was a shortage of qualified candidates for principalships in their districts were asked, "What do you think discourages or prevents qualified applicants from applying for your [school level] principal positions?" (Educational Research Service and Gordon S. Black Corporation, 1998, p. 6). Their top 10 impediments were as follows:

1. Compensation insufficient compared to responsibility.
2. Job too stressful.
3. Too much time required.
4. Difficult to satisfy parents/community.
5. Societal problems make it difficult to focus on instruction.
6. Fewer experienced teachers interested.
7. Testing/accountability pressures.
8. Job viewed as less satisfying than previously.
9. Bad press/PR problems for district.
10. Inadequate funding for schools (p. 12).

Rural Physicians' Decision Factors

The competition for administrative candidates might have a greater negative consequence for smaller rural than for larger urban divisions, and this situation might parallel the difficulties that rural areas had been experiencing with the recruitment of medical doctors. In 1990, "as the result of chronic difficulties in physician availability in many rural and remote communities" (MacDonald & Associates, 1996, p. 1), a Rural Physician Action Plan was implemented in Alberta. Sixteen initiatives categorized under three general headings—Influencing Communities, Influencing Professional Medical Education, and Influencing Rural Physicians—were implemented with the assumption "that if these objectives were all met, then the problems of rural physician recruitment and retention would be adequately addressed" (p. 6).

MacDonald and Associates (1996) evaluated this Rural Physician Action Plan in 1996. Within that evaluation, 38 "key factors [refer to Appendix A] which influence a physician's decision to locate and stay in a rural practice" (p. 19) were identified and categorized under the following headings: (a) Community Factors, (b) Market Factors, (c) Business Factors, (d) Medical Community Factors, and (d) Information Factors. Although many of these factors may appear to relate specifically to the nature of the physicians' profession, they all merit scrutiny. Many similarities may be able to be extrapolated to the characteristics of the rural principal's position. These factors were compiled into 15 key areas and were included as part of the above-mentioned evaluation survey. The 255 rural physicians who responded rated the following 13 to have the most significant influence on their decision to locate and stay in a rural practice:

1. Challenge of a varied practice.
2. Working relationships in medical community.
3. Availability of hospital facilities.

4. Special skills for rural practice.
5. Rural life-style.
6. Number and type of other physicians in the community.
7. On-call and cover-up requirements.
8. Recreational/educational opportunities for self and family.
9. Postgraduate medical experiences.
10. Undergraduate medical experiences.
11. Financial or practice incentives.
12. Availability of continuing medical education.
13. Proximity of friends/family. (MacDonald & Associates, 1996, p. 21)

MacDonald and Associates (1996) concluded that although there was no evidence to indicate that the Rural Physician Action Plan had "materially increased the overall recruitment and retention rates in Alberta over the last five years" (p. 13), there was evidence to suggest that without the plan "Alberta would have suffered a net loss of rural physicians since 1991" (p. 14). Finally, the authors predicted a gloomy future.

> Since 1994, and the implementation of the Regional Health Authorities and the new strategic directions for health in Alberta, the Rural Physician Action Plan has been fighting a losing battle to recruit and retain rural physicians. To date, the system seems stable, but rural physicians are indicating that they are planning to leave in unprecedented numbers. Many of the rural physicians who were interviewed or who responded to the survey are well along the way to putting those plans into effect. (p. 122)

Parallels can be drawn between the attitude of physicians about the effects of the reformation of the health care system and the attitude of those aspiring to educational administrative positions as a result of similar changes within the Alberta education system.

Socialization

Introduction

Miklos (1988) stated, "To speak about socialization or enculturation of administrators is to focus on the ways in which the values, norms, rules and operating procedures that govern the practice of administration are communicated and learned" (p. 65). Hart (1993) suggested:

> It involves individual adjustments and adaptations to the expectations of the group. These adjustments make cooperative effort possible and represent an orientation toward the common needs of the group. . . . Principals come to behave in ways consonant with the expectations of the school. (p. 10)

Leithwood, Steinbach, and Begley (1992) explained socialization as "those processes by which an individual selectively acquires the knowledge, skills and dispositions needed to adequately perform a social role, in this case the school principalship" (p. 148). The socialization of principals, then, is the process of learning the social roles and rules of school administration—becoming a member of the culture. Researchers have identified two general categories of socialization processes that impact on school administrators: professional and organizational socialization (Hart, 1993).

Professional Socialization

Most often school administrators begin their socialization from their experience as teachers. They begin to learn and internalize the norms, values, and behaviours generally accepted as being a part of an administrator's professional role (Hart, 1993). Much of the socialization into the profession, this process of beginning to learn what is necessary to become a school administrator, then, occurs prior to being appointed or selected, and most of it is informal. Historically, for example, there have always been some teachers who have, as Griffiths et al. (1965; as cited in Miklos, 1988) described,

engaged in "GASing behaviours" or "getting the attention of superiors" (p. 66). These teachers have either consciously or unconsciously worked at learning what it takes to become school administrators. They have been the "do-ers," "go-getters" and initiative takers—perhaps the informal leaders. They seemed to strive for and thrive on doing things for the students, staff, and community. Perhaps their motivation has been the intrinsic reward they received from seeing people excited about what they were doing and watching other people become successful. These people who had engaged in this anticipatory socialization often became ideal candidates for administration because, as Miklos, (1988), in referring to Cuban's (1976) work, claimed, "The experiences of educators as teachers probably led prospective administrators to value rationality, impartiality, acceptance of authority and hierarchy, and emotional restraint" (p. 66).

Professional socialization for principals originates when aspiring individuals begin to learn the significance of "specialized knowledge (expertise), as well as the values and ethics that guide the use of this knowledge" (Duke, 1987; cited in Hart 1993). This usually occurs during their socialization while teaching. Professional socialization usually ends when these principals no longer feel like rookies—generally, at the end of the first year of their assignment (Hart, 1993, p. 18). First-time principals experience a double socialization experience—professional socialization to school administration and organizational socialization to their immediate work setting. They must simultaneously break into a new social group and a new profession (Hart, 1993; Van Maanen, 1976, 1977a, 1977b).

Organizational Socialization

Organizational socialization teaches the principal the knowledge, values, and behaviours required in a particular role within a particular jurisdiction or a particular school, and they tend to displace the norms and values learned during professional socialization (Hart, 1993). Socialization that occurs after being hired Lortie (1975)

referred to as "learning while doing" (p. 57). This experiential learning, as Peterson (1986) stated, "involves the development of knowledge, skills and competencies, and the learning of norms and values" (p. 152). "On-the-job-training" is considered "one of the most important ways that [school administrators] gain knowledge and develop skills" (p. 152). Hart (1991) indicated in her synthesis of leader succession and socialization research that there are four key areas that dominate the inquiry into organizational socialization:

1. tactics employed by the organization;
2. socialization stages through which new members pass;
3. personal and social contexts which shape the process; and
4. outcomes or effects (p. 453).

Organizational Tactics

Organizational socialization tactics have been categorized into the three areas of context, content, and sociality (Jones; as cited in Hart, 1993 p. 21). The *context* of organizational socialization refers to the way in which a person is exposed to the socialization process, either within a group or independently, and through a formal, carefully planned process or an informal, unplanned one. The *content* of a socialization process can either be learned in a sequential manner or acquired randomly and can be programmed to either require a fixed learning period or not. Finally, the *sociality* aspect of organizational socialization can occur with the influence of a role model or not and can be designed so that the new principal either disregards previous identities and learning experiences (divestiture) or reaffirms and reinforces his/her existing professional experiences and knowledge (investiture).

Socialization Stages

Peterson (1986) referred to London's (1985) work, which identified three stages of organizational socialization: first-year socialization, in which new

administrators must learn what their superintendents expect of them; second- to fourth-year socialization, in which administrators need to develop a sense of achievement and acknowledgement of their importance to the district; and fifth-year-plus socialization, in which "continual reinforcement of their efficacy to the organization and ongoing collegial contact with other administrators is essential" (p. 152). Hart and Weindling (1996), in their synthesis of numerous research studies on this topic, stated that there are three stages of evolvement that new principals experience that "differentiate periods of learning and uncertainty, gradual adjustment and influence, and stabilization and maturity" (p. 326). They labelled those stages *encounter* and *confrontation* (called the "breaking-in phenomenon"; Van Maanen, 1997a, p. 15), accommodation and integration (a gradual fitting in), and stabilization—educational leadership and professional actualization (pp. 326-328).

Personal and Social Context

Each person brings his/her own perspective to school and a personal preconception of what s/he feels is required to be the principal—his/her own personal context. Some researchers have viewed this personal conception as part of a developmental, life-long evolutionary accumulation of role-related experiences (Hall, 1987; Louis, 1980; both as cited in Hart, 1993). Others suggested that perhaps each person brings his/her own core values and intelligence to professional, situational experiences that shape these personal perspectives (Brousseau, 1983; Kohn & Schooler, 1983; both as cited in Hart, 1993).

Regardless of the personal context of the principal, a complicated set of interrelated fundamental values, beliefs, and assumptions pervades the culture of each school. These values are derived from a blending of those values, beliefs, and assumptions of district office personnel, teaching staff, students, and community members. Certainly, a preexisting culture, an existing social context, awaits a new

principal. Some researchers believed that organizations are cultures in themselves and that administrators need to be socialized into them (Pondy et al., 1983; Smirich, 1983; both as cited in Hart, 1993). Others, from the human systems theory viewpoint, believed that the dynamics of the human interactions between the new principal and other members of the school community shape the culture and thus the effects of the socialization process.

Outcomes or Effects

Van Maanen and Schein (1979; as cited in Hart, 1993) suggested that there are three broad outcomes of socialization that take place on a personal or an organizational level and comprise several aspects of the role of principal. A *custodial response* by new principals would mean they would "imitate their predecessors, learn the requirements of the job, and use customary strategies and actions to meet their requirements" (p. 36). The new principal would mimic the past and the status quo would remain—personally and organizationally. A second category of possible outcomes pertains to *content innovation*: "The new principal accepts traditional norms and goals but changes tactical alternatives, tasks and the knowledge base on which he draws to get his work done" (p. 36). Finally, *role innovation* occurs when "the new principal rejects most of the norms governing conduct and performance [and] . . . makes a genuine attempt to redefine the ends as well as the means" (Schein, 1971; as cited in Hart, 1993).

Mentorship

A method of socialization that has regained credibility and must be addressed is the practice of mentoring. As Caldwell and Carter (1993) indicated in their introduction to a study of mentoring schemes in the workplace,

> The demise of whole levels of management in some settings has resulted in the loss of many whom [sic]once served as supervisors or inspectors. When

> combined with the impact on training, an increasingly frequent organizational response has been the creation of a workplace culture wherein employees work together to learn, monitor and measure in a variety of mentor, coach or preceptor roles. (p. 2)

There are numerous and varied definitions of mentor, but the one that Carruthers (1993) seemed to prefer was Phillips-Jones' (1982) definition, which emphasized the professional and personal development of the protege: "In modern-day terms, *mentors are influential people who significantly help you reach your major life goals*" (p. 11). Walker and Scott (1993), who reported on the mentoring of school managers at both preservice and inservice levels in Singapore, stated that mentoring, preceptorship, or coaching "is simply one method among others of preparing school leaders" (p. 90).

Caldwell and Carter (1993) felt that the culture of the workplace is transforming rapidly, and, as a result, there are four urgent factors that pervade: heightened international competitiveness, stronger culture of service, demands for efficiency, and the realization that traditional workplace practices are increasingly being rejected by society (p. 205). These factors might lead organizations to view mentoring as one of "many practices to be nurtured in an enterprise that seeks to become a 'learning organization'" (p. 218). Nevertheless, when reading about the benefits of a mentorship program introduced by the British government in 1992 in which each recently appointed headteacher was entitled to seven days of mentoring from an experienced colleague (Thody, 1993, p. 59), a question, perhaps a caution, quickly comes to the forefront. Why is it, if mentoring is what it was touted to be, that, five years later in 1997, British school boards are having to hire supply teachers as stand-ins for the headteachers? Perhaps it has a potential negative effect, as Hart (1993) pointed out, crediting Van Maanen with the following idea:

> Mentors also constrain innovation. By turning the socialization of newcomers over to long-time members of the group, organizations virtually guarantee the

> reproduction of existing roles. Even when mentors and new principals have a good working relationship, the results may be undesirable. (p. 23)

However, Alberta Teachers' Association and the Alberta Department of Learning have advocated and recognized mentoring "as a sound professional development opportunity" (Alberta Teachers' Association, 1999).

Commonalities

Hart and Weindling (1996), in their review of literature related to the socialization of principals, summarized the five similarities and differences common to these preparation programs:

1. Alternate models for preparation of school leaders tend to place more or less emphasis on pre- or post-appointment learning.
2. They emphasize formal and informal learning (deliberately structured processes)
3. They depend differentially on experiential learning versus formal study at university or college.
4. Preparation models pay more or less attention to the induction period occurring post-appointment, providing supplemental support after appointment to school leadership roles.
5. Mentors may play a part in the preparation of school leaders, formally or informally (pp. 330-331).

Recommendation from Alberta Research

The authors of two recent research projects in Alberta, although different from this study, provided suggestions for the recruitment and socialization of principals. Thomas (1997) examined the policies and practices used in the selection and evaluation of school principals and compared these policies to the degree to which they were consistent with research and learned opinion. Murphy (1998), in a study of urban, novice principals' perceptions of their preparedness for their new positions, examined and compared the perceptions of newly appointed principals with preservice training

to those with no specific training. From their research Thomas and Murphy offered a number of recommendations for practice. School jurisdictions should (a) identify and recruit potential candidates for administrative positions (Thomas, 1997); (b) provide formal and informal preservice training programs and opportunities for aspiring principals such as job shadowing, mentoring, internships, leadership responsibilities, and administrative-skills workshops (Murphy, 1998; Thomas, 1997); (c) provide formal and informal induction training and support for newly appointed principals (Murphy, 1998; Thomas, 1997); (d) provide inservice or post-successional professional development for their principals (Murphy, 1998; Thomas, 1997); (e) clarify and communicate the roles, responsibilities, and effective behaviours of the principal's position within the district and the school (Murphy, 1998; Thomas, 1997); and (f) assist principals in maximising the creation of networks and support groups (Murphy, 1998).

Retention

Introduction

Barnett's (1998) business-related comments in the *Edmonton Journal* introduced some of the reasons that school jurisdictions would likely need to focus on the retention (and recruitment) of school principals—some of their talented employees.

> The Washington-based Hay Group recently conducted a survey to identify the seven most admired companies. In the survey, seven themes emerged among top companies: They see career development as an investment instead of a sacrifice, take their mission statement seriously, know precisely what they want in an employee, attract successful people who sustain success, promote from within whenever possible, reward performance and measure workplace satisfaction. The survey found that the greatest indicator of overall success for these companies is the ability to attract and retain talented employees. (p. H1)

More Than Financial Remuneration

Since recruitment issues cannot be disassociated from those of retention, I refer again to the American research by the Educational Research Service and Gordon S. Black Corporation (1998) for NASSP and NAESP that confirmed what has been said by Ettorre (1997). The primary influence that discouraged applicants from applying for the principal position was that the compensation was insufficient compared to the responsibilities, but this was only *one* of 10 deterrents to recruitment, all of which may be issues of retention as well.

Davenport (as cited in Ettorre, 1997), a senior practitioner in human resources strategy at Towers Perrin, said that "'calculated commitment'—pay and benefits—gets people to continue to show up for work. But without the attitudinal commitments of job fulfillment, growth opportunities, recognition and, yes, fair financial remuneration, employees won't stay long" (p. 3). For principals, *growth opportunities* suggest opportunities for both career and professional growth. Barth (1986) suggested that care should be exercised when determining how these growth opportunities are presented to principals: "The critical element in learning is ownership. Learning must be something principals do, not something others do for them" (p. 157).

Administrator satisfaction may be a key to the success of retaining quality principals. It is important to examine current trends in the business world and public sector organizations for ideas concerning workplace happiness; some of them may apply to education. Barnett (1998) cited Collison (1997), who asserted in the *Smart Workplace Practices* newsletter:

1. Money is not a good motivator for most employees. So, don't think you have to throw money at employees to keep them from jumping your ship for one that has more glitter.

2. Give employees what they really want: the intrinsic reward of a challenge. The more you get to know your employees, the more you find out what challenge will motivate them.

3. One-on-one coaching. It's a way to give your top performers recognition and help them satisfy their desire to achieve more.

4. Create and maintain a good working environment. This is where you can often beat the socks off your giant-sized competitors.

5. Give top performers leadership roles. It can be as simple as having employees trade off leading meetings, and having top performers do the training and coaching of new employees.

6. Give employees the opportunity to work on a flex-time schedule. Most employees probably want more time for themselves and their families.

7. Identify each employee's strengths. Give them assignments that utilize their strengths. Assign them to teams where their strengths can complement one another. (p. H1)

In a 1998 study conducted by the Saskatchewan Teachers' Federation on the work life of principals, researchers found that some principals were "clearly looking forward to retirement or a career shift to a different occupation" (p. 57). However, "the most interesting comments," they reported, "came from those who felt ambivalent about their role as principal and openly wondered how much longer they would remain in the profession" (p. 57). The report indicated two critical reasons that stood out:

1. Lack of control over professional priorities: Many of the "ambivalent" principals would prefer to spend the bulk of their time and energy teaching students, and working with students and staff in other ways, but find that administrative tasks, especially routine paperwork, consume too much time and energy.

2. Inadequate compensation: Responsibilities and expectations placed on the principal are generally very high, but salary and benefits are unreasonably low. Non-financial rewards such as recognition or appreciation for one's efforts from colleagues, parents, and the community are also perceived by some principals to be in short supply (pp. 57-58).

The dynamics of keeping leaders in their administrative assignments certainly will likely have to do with more than financial remuneration, although adequate compensation will be a factor.

Loss of Human Capital

As reported in the *Edmonton Journal*, prior to this study businesses were already experiencing a "reversal of fortune, [and] companies that were once laying off are now looking to keep their quality employees" (Barnett, 1998, p. H1). And, Ettorre (1997) reported,

> Organizations are wrestling with how to keep what specialists call "high potential" workers, those who are critically important and capable, while hiring new ones who won't leave quickly. ...At its most effective, corporate retention is a sophisticated juggling act. How can companies retain the best of the best, knowing the rest of the world wants them? (p. 1)

Another aspect of the necessity of retaining leaders, Ettorre (1997) pointed out, was the potential loss of intellectual capital (p. 2). In business, the estimated cost of replacing an individual was usually 25% of that person's annual salary (Ettorre, 1997, p. 2). Perhaps the financial cost of replacing a school administrator would be similar. However, the time and effort to provide administrator preservice and inservice socialization and training will be lost. The loss of experiential knowledge may be immeasurable.

In an examination of the capacity of American school districts to affect instructional reform, Spillane and Thompson (1997) found that a district's ability to affect reform depended on three things: (a) human capital (knowledge, skills, and dispositions of leaders within the district); (b) social capital (social links within and outside of the district, together with the norms and trust to support open communication via these links); and (c) financial resources (as allocated to staffing, time, and materials) (p. 199).

Spillane and Thompson (1997) pointed out that a district's ability to hire (*and retain*) "more knowledgeable and sociable administrators and teacher-leaders" (p. 199) will have a greater capacity to implement educational changes "in light of the extraordinary demands imposed on learning" (p. 199). They concluded that

> this new version of the widening gap between the rich and the poor—that is, between districts that are rich in human capital and social capital and those that are poor in these respects—poses a major educational policy challenge for anyone concerned with social equity. (pp. 199-200)

This may apply to some degree to our rural Alberta schools. One must refer back to the superintendents' conclusion that the viability of small schools was decreasing as site-based decision making increased (Eckstrom & Fisher, 1997, p. 2). Consequently, retention (and recruitment) of both human and social capital in rural schools may be a serious issue and should be treated accordingly.

Stress and the Principalship

Any examination of circumstances that directly affect principals' inclinations to remain in their positions cannot be complete without investigating the occurrences that create stress in their lives. Within an inquiry into occupational stress sources among principals and assistant principals in Edmonton Public School District, Ratsoy and Friessen (1985) discovered that certain stressors, although not necessarily occurring more frequently, were higher in intensity than others. The 10 most stressful situations that these principals and vice-principals experienced were as follows:

1. Dealing with a teacher whose attitudes or behaviours are considered unprofessional.
2. Disinterested students.
3. Inability to provide help for students who have difficulty learning.
4. Not enough time to help individual students.

5. Defiant students.
6. Dealing with interpersonal conflict among staff.
7. Being criticized by parents or teachers for some administrative decisions.
8. Lack of parental support.
9. Trying to meet both the academic and social needs of students.
10. Resolving parent-teacher conflicts and misunderstandings (p. 20).

In a later study, Lam and Cormier (1998) examined stressors for rural Saskatchewan school principals. They stated that school is a high-stress working environment, districts were beginning to recognize the financial implications of stress-induced leaves, and it would be important for principals to be in good physical and psychological shape—because they were key to ensuring the success of school improvement (p. 1). They concluded that

> There is strong evidence pointing to a fundamental transformation in the role definitions of school leaders. Internally, principals have to adjust to new school governance where site-based management entails an increasing burden to work without corresponding empowerment. Externally, they have to engage in boundary-spanning activities to assure continued community support. Understandably, such a role has placed principals in the difficult position of trying to tackle new and emergent problems with traditional approaches... . Not unexpectedly, the level of principals' stress in now higher than that of their counterparts a decade ago. (p. 6)

Lam and Cormier (1998) indicated that rural principals experienced stress from the dynamics of their interaction with situations that occurred within the school and those circumstances that required their attention or occurred outside of the school. They labelled those as internal and external factors.

The most conspicuous external stressors were caused by "high levels of uncertainty and anxiety both in their outreach activities and in dealing with various external agencies" (Lam & Cormier, 1998, p. 5). These were identified as "searching for

alternative resources to support existing programs," "seeking alliances with parents and the community in resolving complex student-related problems," and "interaction with law enforcement, health and social agencies" (p. 5). Another notable external stressor was caused by "the involuntary shouldering of more responsibilities from the division office, with no concurrent increase in authority" (p. 5). Principals' stress seemed to increase the more they felt that they needed clarification or assistance from central office because of their lack of training or lack of authority.

Internally, Lam and Cormier (1998) identified two general areas of stress which were a result of "maintenance functions" and "conflict mediating" (p. 5). The maintenance functions of "mainstreaming special needs children while support staff was being reduced" and "the mounting pressure to adopt new curriculum elements without adversely affecting existing programs" (p. 5) created the greatest amount of stress. Functions of "inter-personal conflict among school staff" and "staff inter-group conflict, often as an outcome of the competition for limited resources or situations of jurisdictional ambiguity" (p. 5) were identified as the two significant conflict-resolution stressors.

In conclusion, Lam and Cormier (1998) offered three suggestions.

> First, as a short-term solution, school division-level administrators need to reexamine the existing decentralization process to ensure that principals are not deprived of the authority required to execute their new responsibilities.
>
> Second, school divisions, in conjunction with the faculties of education, should provide on-site support to principals confronted with unfamiliar external challenges. This should include inservice activities designed to orient and equip principals to deal with new role expectations.
>
> Third, on a longer-term perspective, universities offering educational administration programs should furnish aspiring school administrators with meaningful managerial and political skills which will prepare them more adequately for a transformed leadership role in an increasingly turbulent environment. (p. 7)

An important factor for the retention of rural-school principals may be the ability of districts to reduce the work-related levels of stress that these school leaders experience.

It is also interesting that Williams (1981), in her study of occupational stress experienced by Alberta teachers, indicated that there was also a direct relationship between personal-life stress and work-related stress (p. 209). Dua (1994) suggested in her study of job stressors and their effects that extraorganizational stressors such as "family problems, personal problems and social problems" (p. 60) causes additional suffering which results in reduced work quantity and quality. In their examination of administrator burnout, Gmelch and Gates (1998) pointed out that there is an intercorrelation between personal, professional, and organizational variables that impact on administrators' health and contribute to the potential of administrator burnout (pp. 154-157). Consequently, it may become a necessity for jurisdictions to be concerned with the personal, extraorganizational wellness of their principals as well.

Chapter Summary

Within this chapter, literature related to the recruitment, socialization, and retention of principals as school leaders was reviewed. A fundamental process in the recruitment and selection of principals is the development and verbalisation of jurisdictional statements of philosophy—system goals and priority policies. No matter how eloquent these statements are, however, they may not affect the quality and quantity of the applicant pool. Consequently, districts should acknowledge that recruitment of principals is two-way process that involves decisions made by both the district and the applicants (Winter & Dunaway, 1997) and should reflect that in all aspects of the recruitment process.

A joint NASSP and NAESP project (Educational Research Service and Gordon S. Black Corporation, 1998) identified a number of factors that discouraged teachers from applying for and perhaps remaining in principal positions. Only one of these

deterrents, as expressed by American principals, related to inadequate financial compensation. This indicates that there are, as well, a great number of intrinsic factors to be considered when contemplating recruitment and retention strategies for the future, not the least of which is the ever-increasing responsibility that a person in the principal position shoulders. Also worthy of note, but not directly related to education, are the findings of a report that identified factors that influence decisions of rural physicians which likewise described intrinsic factors that influence physicians' decisions to choose to practice and remain in rural communities.

When speaking about factors that motivate people to remain within their organizations and in administrative positions, the literature indicated that intrinsic motivators are often more influential than money—other than fair financial remuneration. Also, the literature about leader retention advised that consideration should be given to the potential costs incurred with the loss of both intellectual and experiential capital. This loss may create "social equity" problems for rural schools in the future.

The Saskatchewan Teachers' Federation (1998) indicated that they believed that "supports and processes are (would be) needed for the recruitment and retention of principals, particularly for schools located in rural areas and the north (p. 61). This concern may consequentially be related to research out of Saskatchewan that indicated that the levels of work-related stress for rural principals was "now higher than that of their counterparts a decade ago" (Lam & Cormier, 1998, p.6). However, stress is multidimensional. Both work-related and personal stressors contribute to a possibility of administrator burnout and consequent early exits from their positions.

Once the school administrative leaders of tomorrow are recruited and socialized, keeping these highly trained and competent people will likely create another problem that jurisdictions may have to take into account. Businesses view their successful people as human capital and measure the need to retain these top

performers in terms of financial and intellectual costs. In the educational setting, Spillane and Thompson (1997) indicated the value of recruiting and retaining "knowledgeable and sociable administrators and teacher-leaders" (p. 199) and cautioned that the consequences of not having this human and social capital may result in future social equity issues. Administrator burnout created by interrelated personal, professional, and organizational stressors may impact the ability of organizations to retain their administrators. Finally, the dynamics of keeping/retaining successful people in leadership positions is a complicated combination of numerous factors. Fair remuneration, a good working environment, educational growth opportunities, a sense of control, recognition, a sense of support, and career-advancement opportunities are just some of the factors that have been identified as leading to satisfaction and consequently influencing an organization's ability to retain (and recruit) talented people.

Because Alberta rural school jurisdictions are experiencing a shortage of applicants for rural administrative positions, special attention will likely have to be directed to the *recruitment* of future principals. These future rural-school principals will play an essential role in providing leadership (into whatever form it evolves) within their schools. But recruitment will not be enough. Selecting potential principals-as-school leaders and *socializing* them into their leadership roles will be important processes. Finally, once the leaders of tomorrow's rural schools have been recruited and socialized, *retaining* these highly trained and competent people will likely become another concern.

CHAPTER 3

Methodology

In this chapter, matters are discussed that relate to the research orientation underlying the choice of method and the research method itself. Ethical considerations, delimitations and research timetable of the study are also identified.

Research Orientation

Given the context outlined in the introduction, the aim of this research was to develop an understanding of what might be required to ensure that Alberta rural schools continue to have effective leadership in the future. Thus the goals of the current research were pragmatic. How *will* jurisdictions recruit rural-school principals? How *will* jurisdictional personnel strive to ensure that these new leaders become principals who will be able to respond productively to the complexities of tomorrow's rural schools? Finally, what *could* be done to encourage them to stay with their districts?

Besag (1986) stated, "The question should determine the methodology. The methodology should not determine the question" (p. 13). Consequently, I was confronted with the choice between utilizing quantitative or qualitative methods. Berg (2001), noted that,

> Quality refers to the what, how, when, and where of a thing—its essence and ambience. Qualitative research thus refers to the meaning, concepts definitions, characteristics, metaphors, symbols, and descriptions of things. In contrast, quantitative research refers to counts and measures of things. (p. 3)

Rudestam and Newton (1992) also suggested, "Whereas the quantitative researcher is apt to record a small set of previously identified variables, the qualitative researcher seeks a psychologically rich, in-depth understanding" (p. 31). Denzin and Lincoln (1998b), add that quantitative research is often purported to be within a value-free

framework (p. 4). For the researcher, these research questions appeared to require in-depth—certainly not value free—responses grounded in the knowledge of people with rural-school experience, and a qualitative naturalistic inquiry was the obvious choice.

To secure a rich and insightful rural viewpoint, the next important question was, *Which* qualitative research method would provide the broadest, most extensive, and in-depth answers? Bogdan and Biklen (1998) indicated, "If you want to understand the way people think about their world, . . . you need to get close to them, to hear them talk" (p. 32). As well, Lincoln and Guba (1985) suggested that the purpose for interviewing was to obtain, "*here-and-now constructions* of persons events, activities, organizations, feelings, motivations, claims, concerns and other entities; [and] . . . *projections* of such entities as they are expected to be experienced in the future" (p. 268). Consequently, in-depth interviews were used to gather data for this study.

Research Method

I wanted to get the perspective of rural educators in leadership positions and utilize their knowledge to suggest answers to questions that stress how their current experience might influence the recruitment, socialization and retention of future rural-school principals. As Kvale (1996) suggested, the qualitative research interview is, "literally an inter view, an exchange of views between two persons conversing about a theme of mutual interest" (p. 2). He went on to add that, "a semistructured life world interview . . . [was] an interview whose purpose [was] to obtain descriptions of the life-world of the interviewee with respect to interpreting the meaning of the described phenomenon " (pp. 5-6). With that in mind, it was important to ask, Who would be in the best position to offer the most informed speculations about strategies that would maximize efforts to fill our future rural schools with principals who are leaders? Because the purpose of this research was to gather information from people who knew

about rural schools and the nature of the rural principal position, the participants were current rural educational personnel who occupied leadership positions and utilized two semistructured interviews with each participant.

Participant Selection

Having determined that I wanted to capture the lived experience of rural leaders, I first contemplated including only recently appointed principals in the study—those in the first three years of their assignment. However, it struck me that by limiting the respondents to neophyte principals, I was discounting the experiences of senior principals. These seasoned principals would have encountered the changes in educational administration that have occurred within the last 10 to 20 years and, with that wisdom, might be able to contribute a great deal to the identification and description of possible recruitment, socialization, and retention strategies for the future. Further reflection led me to conclude that my study would not be complete without an understanding of the experiences of those people involved in jurisdiction governance, and I must, therefore, include the district person responsible for hiring rural principals. Thus, with all their contributions, my study would likely be richer and more meaningful. Consequently, the study included rural principals—rookie and experienced—and their district human resources officers.

I was also interested in ensuring that this research reflected the nature of public schools in Alberta; consequently, I felt that I must include personnel from a Catholic jurisdiction. As well, because there may be degrees of "rural-ness," I felt that it was important to include personnel from at least one jurisdiction that was situated closer to a major city and one that was more distant. Permission to conduct the research was secured from the superintendents of three jurisdictions that met the above-mentioned criteria. As well, because all of my experience has been in schools with elementary grades, the rural principals I had chosen to interview were principals of schools that

contained elementary grades. In addition to that, because no educational research would be complete if it did not examine the opinions of both genders, I chose to interview both male and female participants. Finally, on the advice of the Candidacy Committee, a fourth senior principal was interviewed prior to proceeding to the other nine interviews. The purpose of that initial interview was to double-check the quality of my interview questionnaire. After consultation with the three superintendents, participants were selected from a list of potential participants identified by the jurisdictions based on the previously mentioned criteria *and* their willingness to participate in the research project. Efforts were made to select participants that represented the nature of the rural context, specifically size and type of school, size of community, distance from major urban centres and gender of participants.

Researcher as Participant

As mentioned earlier, Kvale (1996) spoke about the concept of interviews as being, "an inter-change of views between two persons" (p. 2). Fontana and Frey (2000), suggested that during interviews, researchers can no longer pretend to be invisible and nor can they consider their participants, "faceless subjects" (p. 661). Paget (1999) also indicated that, "the specific person interviewing, the 'I' that I am, personally contributes to the creation of the interview's content" (p. 91). She goes on to add that the researcher is both the subject and the analyst of his or her own enquiry, and as analyst, the researcher, knows more than they know how to show (p. 91). Consequently, it is important that I, the researcher for the current study, reveal to you, the reader, who I am. I present a brief biography.

> Carl McColl has taught and been a school-based administrator at all levels from Kindergarten to grade 12 in various rural districts within the province. Although his teaching assignments have been predominately in the areas of elementary mathematics and language arts, he has also taught junior high and senior high school subjects. His administrative assignments have included vice-principalships in K – 6, K – 9 and 4 – 12 schools; and principalships in K – 6,

> K – 9 and 7 – 9 schools. He has coached all major sports in elementary junior high and high school; organized, coordinated and supervised many elementary outdoor education experiences; as well as directed, choreographed and conducted numerous elementary choruses for concerts and festivals. He has been an active member of the ATA and has served on numerous local and provincial committees. He also has served as: President of the Greater Edmonton Regional Council on School Administration, Director of the Banff Leadership Seminar, President of the Provincial Council on School Administration, and Alberta Director of the Canadian Association of Principals.

Trustworthiness

All research, whether it be quantitative or qualitative, should be examined for adherence to some form of rigorous, disciplined research procedures. There is some debate, though, regarding exactly what rigorous, disciplined research is. Traditional, positivistic social science, as Denzin and Lincoln (1998b) indicated,

> applies four criteria to disciplined inquiry: *internal validity*, the degree to which findings correctly map the phenomenon in question; *external validity*, the degree to which findings can be generalized to other settings similar to the one in which the study occurred; *reliability*, the extent to which findings can be replicated, or reproduced, by another inquirer: and *objectivity*, the extent to which findings are free from bias. (p. 186)

However, because of the qualitative nature of this research, I preferred the Lincoln and Guba (1985) "naturalistic" notion of *trustworthiness*. In their words,

> The basic issue in relation to trustworthiness is simple: How can an inquirer persuade his or her audiences (including self) that the findings of an inquiry are worth paying attention to, worth taking account of? What arguments can be mounted, what criteria evoked, what questions asked, that would be persuasive on this issue? (p. 290)

Kvale (1996), in his book about qualitative research interviewing, suggested that we do not reject the concepts of reliability, generalizability and validity, but have reconceptualized them in forms relevant to interview research (p. 231). Lincoln and Guba (1985) identified four naturalist alternatives to the conventional approaches of

validity and reliability that operationalize the concept of trustworthiness and suggested that to establish trustworthiness, naturalist researchers must establish the credibility, transferability, dependability, and confirmability of their research (pp. 300-331). Consequently, using these reconceptualized notions and applying them to this research study, I hope to persuade my readers that this research is worthy of *their* trust.

Credibility

To establish the credibility of qualitative research, Lincoln and Guba (1985) suggested that researchers must engage in "activities that make it more likely that credible findings will be produced" (p. 301). Kvale (1996) suggested that the credibility of interview research concerns "validity issues throughout an interview investigation" (p. 236). What follows, then, is a description of how I established this credibility at the interview design stage, the interview stage, the transcription stage, and the analysis stage.

Interview Design Stage

Credibility was established during this stage through the use of triangulation, the formation of the interview questions for information collection, and the re-formation of these questions following a pilot study.

Triangulation. Denzin (1978) recognized that "the act of doing research is an act of symbolic interaction," and that each research method and each researcher will generate "different lines of action" (p. 294) toward the object/person/thing being studied. Berg (2001) rephrased these as "lines of sight" and went on to say that "by combining several lines of sight, researchers obtain a better, more substantive picture of reality; a richer, more complex array of symbols and theoretical concepts; and a means of verifying many of these elements" (p. 4).

To present a richer, more substantive vision of what will be required to place, prepare, and keep productive educational leaders in Alberta's rural schools of the future, I chose to utilize a modification of Denzin's (as cited in Berg, 2001, p. 5) three subtypes of *data triangulation*: time, space, and person. Specifically, I chose to interview three somewhat dissimilar groups of people, to interview these people from three different rural jurisdictions, and to interview them on two different occasions.

Information Collection. Information was gathered through two audiotaped interviews. Demographic data were collected using a short questionnaire. Each interview followed, as Berg (2001) defined it, a semistandardized interview format which

> involves the implementation of a number of predetermined questions and/or special topics. These questions are typically asked of each interviewee in a systematic and consistent order, but the interviewers are allowed freedom to digress; that is, the interviewers are permitted (in fact expected) to probe far beyond the answers to their prepared and standardized questions. (p. 61)

The predetermined structured interview questions were modifications of the research questions. Further questions were asked following an unstandardized interview format as suggested by Berg (2001): "Interviewers must develop, adapt, and generate questions and follow-up probes appropriate to the given situation and the central purpose of the investigation" (p. 61). These questions followed topics covered in the literature review. A second interview was conducted with each participant, and questions for that interview were generated to clarify and expand the substance of the topics generated by the participants during the first interviews.

Informal Pilot Study. To practice the skill of interviewing, to try out the semistructured interview instrument, to encounter the transcription of voice recordings to text, and to experience the systematic analysis of the transcriptions, I conducted an informal pilot study. During this informal study I interviewed two small-school, rural

principals who were in attendance at the 1999 Educational Leadership Academy. As a result of my experience from that informal study, I concluded the following:

1. All demographic data would have to be gathered prior to the first interview so that this information could be used as part of a rapport-building strategy during that interview (refer to Appendix D).
2. A second interview would be essential.
3. During the interviews, the phrasing of each question would be important. Considerable care would have to be taken to avoid asking questions that could be interpreted in a variety of ways. As well, it would be important to avoid framing the responses to the questions by putting "words in the mouths" of the interviewees when seeking further understanding.
4. Respondents would need time to contemplate their answers, and that the interview questions would need to be forwarded to the interviewees prior to each interview (see Appendix E).

Interview Stage

To ensure the trustworthiness of the information collected from the interviews, I utilized Kvale's (1996) six criteria for quality interviews.

1. The extent of spontaneous, rich, specific, and relevant answers from the interviewee.
2. The shorter the interviewer's questions and the longer the subjects' answers, the better.
3. The degree to which the interviewer follows up and clarifies the meaning of the relevant aspects of the answers.
4. The ideal interview is to a large extent interpreted throughout the interview.
5. The interviewer attempts to verify his or her interpretations of the subject's answers in the course of the interview.

6. The interview is "self-communicating": It is a story contained in itself that hardly requires many extra descriptions and explanations (p. 145).

I also avoided a few common problems such as "putting words in the interviewees mouths"; and, as Berg (2001) indicated, also avoiding affectively worded, double-barrelled, and overly complex questions (p. 69). I began the interviews by developing rapport with the interviewee. Each interview was paced, kept productive, and intuitively terminated; and closure was gained when the interview ceased to be productive (Lincoln & Guba, 1985 pp. 270-271).

Initial interviews were arranged on an individual basis with each of the participants. The structured questions (see Appendix E) for the first interview were mailed or faxed to each participant prior to the interview. Prior to the second interview participants were forwarded a listing of the five general themes, an outline of the topics within those themes, and the structured questions for the next interview (see Appendix F). During that second interview, a member check was completed. Participants were provided with the opportunity to confirm, deny, clarify, and/or modify any of the themes attributed to them. They were also presented with an opportunity to comment on the emerging themes and on any of the topics that were introduced by others.

Interview Transcription Stage

Each audiotaped interview was transcribed verbatim from voice to text. To ensure the credibility of these transcriptions, I personally reviewed, revised, and confirmed the accuracy of each transcribed interview. Because the purpose of the study was to analyse participants' perceptions and opinions, and the information gathered was not subjected to either sociolinguistic or psychological analysis, these verbatim transcriptions were edited for grammar and written in literary style. Finally, each participant was presented with an opportunity to listen to the audiotaped

interviews and to examine, edit, confirm, or change the edited transcription of each interview.

Interview Analysis Stage

Once transcribed, the information collected was open coded using the basic guidelines as suggested by Strauss (1987) and explained by Berg (2001). I questioned and noted my perception of the meaning of the interview text as it related to the literature review; analysed the interview text by closely examining words, themes, and concepts that related to this study; jotted down any intuitional ideas and thoughts as they arose; and avoided assumptions about the relevance of demographic data (pp. 236-238).

Once open coded, the interview transcriptions were first framed into common subthemes around each category—recruitment, socialization, and retention. The coded transcriptions were also re-sorted, subdivided, and re-subdivided into other patterns, commonalities, and relationships as perceived by the researcher and evidenced by the research. Relationships were identified between the interview transcriptions (theme, classes, and subthemes) and the demographic data as well.

Transferability

Lincoln and Guba (1985) said that it was not a researcher's "task to provide an index of transferability; it *was* his or her responsibility to provide a *data base* that makes transferability judgements possible on the part of potential appliers" (p. 316). Kvale (1996) wrote about *analytic generalizability* that "involves a reasoned judgement about the extent to which the findings from one study can be used as guide to what might occur in another situation" (p. 233). Denzin and Lincoln (1998b) named this "anticipatory accommodation." They utilized the Piagetian notion of cognitive processing and suggested that

> humans reshape cognitive structures to accommodate unique aspects of what they perceive in new contexts. In other words, through their knowledge of a variety of comparable contexts, researchers begin to learn their similarities and differences—they learn from their comparisons of different contexts. (p. 288)

This research was intended to be a thick description of some rural principals' and central office human resource officers' opinions about what might be required to recruit, socialize, and retain rural-school principals in the future. Whether or not the findings of this research will be transferable or generalizable to other contexts will have to be determined by *potential appliers*.

Dependability and Confirmability

The dependability of a research inquiry relates to the consistency or the reliability of replicated research—whether or not the findings will be similar. As well, the conventional concepts of researcher objectivity and neutrality have been modified by naturalist researchers, as Lincoln and Guba (1985) pointed out, so that the "issue is no longer the investigator's characteristics but the characteristics of the data: Are they or are they not *confirmable*?" (p. 300). The dependability and confirmability of this research was earned, first, through the triangulation process and the informal pilot study that were described previously; and second, through the use of two member checks, one prior to the second interview and the other upon completion of the chapters that reported the findings. As a result, for example, of the second member check, on the recommendation of one of the participants, changes were made to these chapters in order to increase confidentiality.

Ethical Considerations

Denzin and Lincoln (1998a) cautioned, "Because the objects of inquiry in interviewing are human beings, extreme care must be taken to avoid any harm to them" (p. 70). Therefore, I addressed the traditional ethical concerns of informed consent, the right to privacy, and the protection from harm (1998a, p. 70; 1998b, pp. 170-179). I

did this by informing the participants about the nature and purpose of the study; seeking their voluntary participation in the study; allowing their withdrawal from the study at any time; providing them with the opportunity to receive, read, and change the edited text of each interview and to add to or alter the coded and themed data; and, finally, guaranteeing the confidentiality of their statements.

Each voluntary participant was asked to read and sign a letter containing the above information (see Appendix B). The audiotaped interviews and the transcriptions were maintained in strict confidence and held in a secure area. All information collected will be destroyed after the conclusion of the research and following the convocation of the researcher.

The possibility exists, as Denzin and Lincoln (1998a) warned us, that "the techniques and tactics of interviewing are really ways of manipulating respondents while treating them as objects or numbers rather than individual human beings" (p. 71). As a field worker, however, I exercised common sense and moral responsibility (Punch, 1986) to the participants of the research first, to the study next, and to myself last (Denzin & Lincoln, 1998a, p. 72).

Permission to conduct this survey was requested and received from the Ethics Committee of the Faculty of Elementary Education, the superintendent of each of the participating districts, and each of the individual participants.

Delimitations of the Study

The study was limited to the participants within three jurisdictions that contain rural schools. It was further limited to the opinions of 10 participants: three principals within the first three years of his/her appointment, four senior principals with at least seven years' experience in that position, and three district human resources officers.

Research Timetable

Research on the topic proceeded on the following schedule:

November 1999	Contact with superintendents.
	Identification of participants
	Contact with participants to secure participation
December 1999	First interview with participants.
December 1999 - February 2000	Preparation of interview transcripts.
	Primary analysis of data.
February 2000	Member checking of transcripts and analysis
	Second interview with participants.
February 2000 - April 2000	Further analysis of data.
May 2000 – February 2001	Preparation of thesis.
March 2001	2nd Member Checking
April 2001	Dissertation defence

CHAPTER 4

Introduction to Research Findings

The purpose of this study was to explore and begin to understand what would be necessary to recruit, prepare, and keep principals in Alberta's rural schools. The interview participants were asked to address three foundational research questions.

1. What strategies will be required to recruit qualified people to rural principalship positions?

2. What would be considered exemplary methods to socialize future rural principals into their leadership role?

3. What might be necessary to encourage future rural principals to stay in their administrative positions and remain within their jurisdictions?

What follows is a presentation of my analysis of participant comments during the interviews as they relate to these research questions. The analysis of participant responses confirmed that characteristics of recruitment, socialization, and/or retention are not easily isolated and are in fact elaborately interrelated. As a result, the findings are presented under three headings entitled "The Work-life Landscape of Rural-School Principals," "Findings Related to Recruitment and Retention," and "Findings Related to Socialization." This chapter begins with an introduction to the participants of the research.

Demographics

The study participants consisted of 10 purposely selected rural administrators from three public jurisdictions that contained rural schools within their boundaries. One of the jurisdictions was a Catholic separate school jurisdiction. The boundaries of the three jurisdictions extend from a major Alberta city to the border of a neighbouring province. Seven of the participants were principals of rural schools containing

elementary grades: three were in the first or second year of their first principalship; the remaining four had six or more years of experience at the principal position. The remaining three participants were central office personnel responsible for the hiring of principals within the three jurisdictions. Three of the participants were women, a beginning principal, a senior principal and a central-office human resource officer. All principal participants were married. Schools ranged in size from 75 to just over 500 students. Four of the schools contained students in grades K – 12, one contained K – 9 students, one K – 8 and one K – 6. Three of the schools were located in villages with populations less than 800, two schools were located in towns with populations between 1,000 and 2,000, and two schools were located in towns with populations between 4,000 and 6,000 (Alberta Municipal Affairs, 2000).

The following is a brief description of the participants and their schools or school jurisdictions. To protect the identity of the participants, their schools, and their school jurisdictions, pseudonyms have been used.

Gordon

Gordon was a human resource officer from the Gala School Jurisdiction, which was a large suburban and rural jurisdiction that bordered a major Alberta city and extended as far as 100 kilometres away from that city. The jurisdiction has approximately 15,000 students and about 900 professional staff. The students are housed in 40 schools, including one school located within a Hutterite colony. Eight of those schools would be considered rural.

Gordon has been an educator for approximately 32 years, with 4 years of experience as a classroom teacher, 5 as a vice-principal, 8 as a principal of an elementary school, and 15 years in central office. He is responsible for recruitment, training, placement, and evaluation of school administrators in his jurisdiction.

Fred

Fred was the principal of an elementary school within the Gala School Jurisdiction situated approximately 45 minutes from a major Alberta city. Fred has been an educator with the same jurisdiction for 21 years. He taught for 11 years in elementary and junior high grades before coming to the school to which he is currently assigned. After 2 years as an elementary physical education teacher, he became vice-principal for a year and has been the principal for the past 7 years. Fred reported that he did not consider administration as a possible career until after 10 years of teaching.

Lawrence

Lawrence was the principal of a multidivision school in the Gala School Jurisdiction located approximately 30 minutes from a major Alberta city. Lawrence has approximately 16 years of experience as an educator in the same jurisdiction. He taught for 13.5 years as a business education teacher in a junior/senior high school before coming to his present school. He spent a year as vice principal before being assigned his current principalship 2 years ago. Becoming a principal was Lawrence's career plan prior to his initial teacher preparation program.

Edward

Edward was a human resource officer with the Spartan School Jurisdiction, which bordered a neighbouring province. The jurisdiction had approximately 5,000 students and 350 professional staff. The students were housed in 27 schools, including five schools located on Hutterite colonies. All of the schools would be considered rural. Edward has been an educator for approximately 27 years, with 7 years experience as principal of a Grade 1-12 school and 11 in the jurisdictional office. Aspiring to the principalship became a goal within the first 10 years of his teaching career.

David

David was the principal of a multidivision school in the Spartan School Jurisdiction situated approximately 2.5 hours from a major Alberta city. David has 30 years of experience as an educator, all at the same school. He taught for 4 years prior to being the vice-principal for 16 years, and he has been the principal for the past 10 years. Achieving the principalship was not a part of David's career plan, and he considered the position only after his appointment to the vice-principalship.

Yvonne

Yvonne was the principal of a multidivision school in the Spartan School Jurisdiction situated approximately two hours away from a major Alberta city. Yvonne has approximately 25 years of experience as an educator. She taught for 19 years in both rural and urban schools prior to becoming the principal of a private urban school. She has been the principal in her current school for 6 years. Achieving the principalship was not a part of Yvonne's career plan until she realized her potential after teaching for approximately 10 years.

Matthew

Matthew was the principal of a multidivision school in the Spartan School Jurisdiction situated approximately one hour from a major city. Matthew has approximately 12 years of experience as an educator. He taught for 10 years in a junior/senior high school and became vice-principal of a rural school for 1 year in another jurisdiction before coming to the school to which he is currently assigned and is in his first year as principal of the school. Achieving the principalship was not a part of Matthew's initial career plan, and he chose to pursue the position after his experience as vice-principal.

Eleanor

Eleanor was a human resource officer of the Empress Regional Division, a Catholic separate division. The jurisdiction has a student population of approximately 4,000 students, a professional staff of 150 teachers, and approximately 70 nonprofessional members of staff. The students are housed in eight schools, including two schools designated as home education schools. All of the schools would be considered rural.

Eleanor has been an educator for 27 years. She taught elementary and secondary students and was a social studies consultant for 1 year and a principal for 7 years. She has been in the jurisdiction office of Empress School Jurisdiction for 2 years. Prior to her appointment to the jurisdiction office, achieving the principalship had been a part of Eleanor's career plan.

Elaine

Elaine was the principal of a multidivision school in Empress Regional Division situated approximately two hours from a major city. Elaine has 26 years of experience as an educator in the same school. She taught for 15 years prior to becoming part of the school's elementary management team for 10 years. She has been the principal in her current school for 1 year. Achieving the principalship was not a part of Elaine's career plan until she realized her potential after teaching for approximately 10 years.

Norman

Norman was the principal of a multidivision school in the Empress Regional Division situated approximately two hours from a major Alberta city. Norman has approximately 25 years of experience as an educator. He taught for 19 years in both rural and German schools prior to becoming the vice-principal of a Grade 7-12 school. He spent three years as principal in another K-12 school within the same jurisdiction

prior to his appointment to his current school. He had been the principal in his current school for 8 years. Achieving the principalship had been part of Norman's career plan.

The Work-life Landscape of Rural-School Principals

Introduction

When the participants speculated about what would be needed to ensure that jurisdictions find, prepare, and keep principals in Alberta's rural schools, they told numerous stories about their own experiences and extrapolated those to the future. Participants used these stories to describe, in their experience, the nature of the roles and responsibilities of rural-school principals. Their stories described a gamut of these experiences. All of these stories, when pieced together, portrayed a collage-like depiction of the professional work life of a typical rural-school principal. And because these real-life components of a rural-school principal's work-life would likely impact directly on a jurisdiction's ability to recruit, socialize, and retain principals in the future, it seemed essential to me that these experiences be presented first. As indicated in the Definition of Terms section, an ideal metaphor to describe this depiction would be the "landscape" metaphor developed by Clandinin and Connelly (1995). Consequently, in this chapter I reveal the participant-described work-life landscape of rural-school principals.

When the participants speculated about the nature of future principals' work lives and spoke about the numerous and varied roles and responsibilities that a future rural-school principal would likely encounter, they described characteristics of their landscape that pertained to six general aspects of the rural-school assignment. Characteristics of a rural-school principal's work-life landscape have been organized and presented under some of the operational areas identified in the *Project Ask* study (Kaida et al., 1980): school-community interface, resource management, Special Education, administrative conflict, staff personnel, and curriculum and instruction.

School-Community Interface

An all-important and ever-present aspect, as all participants pointed out, of the landscape of a rural-school principal would encompass the development and maintenance of interpersonal relationships with people in the community, with parents and families of students, and with the students themselves. Principal David's statement exemplified this: "being a principal, you have to know how to get along with people, both teachers and parents and students." Principal Norman also said, "The interactions with people and the relationships that you have established within your own school" will likely dictate how the community at large, parents, and kids are going to react. "I guess it creates an atmosphere," he added. He cautioned that "one of the things in a smaller community, if you don't have the community with you, if you're at odds with the community, (not just the parental community, but the community as a whole) you can have difficult times."

Features of the school-community interface aspect of a rural-school principal's work-life landscape that participants chronicled during the interviews have been presented as they relate to interactions with rural-school community members, parents, and students.

Community-Related

The rural community significantly influences the work-life of a rural-school principal. All participants agreed that it would be very important for future rural-school principals to establish connections with the community.

An omnipresent aspect of a rural-school principal's work-life landscape is that rural community members would, as Yvonne said, "certainly like their school leaders to live in their community." She noted also that rural community members would like the principal's children to attend school in the community as well. Gordon affirmed that, although he would consider it a positive occurrence if administrators and their

families were to move to the rural community, their jurisdiction did not have a policy that required that he and the jurisdictional human resource officers do so. As a result, the community-related characteristics of a rural-school principal's work-life landscape varied depending upon where the principal lived—whether he/she chose to reside within the community (resident principal) or to reside elsewhere (non-resident principal).

Elaine, a resident principal, felt that it would be "very important" for future rural-school principals to understand that they would need to spend time out in the community and be seen as viable, contributing members of the community. She related an anecdote about a former principal who, because he did not reside in the community or attend community functions, was not viewed as a community person. She also spoke about the additional task of having to answer late-night alarm-company phone calls herself because the principal didn't reside in the community. Elaine went on to explain that the amount of time "outside of [one's] professional role" that a rural-school principal was "willing to spend out in the community [was] really [one's] PR role." She added that the amount of involvement would likely vary inversely with the size of the community.

Norman, also a resident principal, said that future rural-school principals would "have to be visible in the community; not just from the school prospective," but, he added, because of the high-profile nature of the position, they would "have to be known as a reasonable, down-to-earth kind of individual that people would trust their kids with." Norman explained further that when a principal did not live in the area and a conflict arose, some parents rebuked efforts at solving the issue by suggesting, "You don't live in the area; you wouldn't know." He also described the way that community members appreciated his family's participation in different organizations and their attendance at social events. As he said, "Parents appreciate your support [because] you're part of the community." Norman and Elaine both described the close fishbowl-like nature of the work life of a resident rural-school principal. As Norman said, "If we

go out for supper, we're always going to meet someone we know." Elaine said, "People will contact you wherever. They will stop you in the middle of the store and talk to you." With the stipulation that, "it's not to degrade a student or a teacher," Elaine eulogized the virtues of being a resident principal: "I think it's wonderful. I think the more contact you have with people the better." Norman reiterated Elaine's preference when he said, "It's another one of those Catch-22 things, but I think that it is better to be there. You certainly get more support from the people you're working with."

However, Matthew identified another feature of a rural-school principal's work-life landscape: "Smaller communities are far more closed, and they tend to have issues in regards to things like tolerance and objectivity with regards to new ideas or new peoples or peoples of new backgrounds." Norman related another illustrative anecdote from another rural community that corroborated Matthew's observation:

> My wife wasn't very comfortable in the town. She has a French background, and if you were of any other origin, you were looked upon as being a little bit different. When I was speaking French to my kids on the street, many times I was stopped and reminded, "You know the language around here is English. Haven't you learned that yet?" My wife would get that much more than I, and we decided that we weren't going back.

On the other hand, Fred, a non-resident principal who had chosen to live in another rural area, explained that he did not reside in the community because he did not want to have to discuss school-related issues with parents at the barbershop or the curling rink. Lawrence, a non-resident principal, mentioned the extra effort that was required for him to become connected with the community:

> What I had to do to make this work for me, I really had to get involved in the community. Here, I go down Main Street, I know all the businesses, and I deal with all the businesses. I'm involved in Town Council, and when they are doing something in town, they will come here and involve me. There's real community interaction.

Another community-related work-life feature of a rural-school principal's work-life landscape would likely be, as Fred pointed out, "trustee intervention." "Sometimes," he said, "trustees can be very political and start getting in there to make sure their weight is felt in the school setting. Some of them can really intervene."

When Gordon, a human resources officer of the largest jurisdiction in the study, was asked by this researcher, "What kind of person do you think will be successful in a rural school?" he pointed out a fundamental truth for rural-school principals: "They will need to be able to work in a community setting. They will need to be able to work well with people and be prepared to invest the time to make those kinds of connections with the community." He further said, "Because each of our rural communities are unique in their own cultural makeup and history and traditions and so on," they will need to develop an "understanding of the uniqueness—the character of the community."

Many participants suggested that a rural-school principal's work-life landscape would be different from that of an urban/suburban-school principal. For example, Matthew, a first-year principal in a rural K-12 school, said that a school in a large community "was one of the major institutions in a larger setting, not the *only* one." Because his school was the focal point for social activity and "the single most significant institution in the community, . . . as a result, every particular challenge, need, or desire of people in relation to the school [was] magnified." As Lawrence said, a principal's community in an urban/suburban school would consist of the "school and the kids in the families that come to [the] school." On the other hand, he described his experience as a principal of a rural school:

> I'm finding everything that happens out [in the community] comes into the school, and I'm expected to be involved in resolving it. Whether it's a family feud or whether there's been a fight at the hockey rink on a weekend, anything and everything comes in here. The school is the focal point of this town.

Parent-Related

Participants generally concurred that interpersonal interaction with parents and families of students and the effect of that interplay were important features of a rural-school principal's work-life landscape. Elaine, for example, explained one of the unique roles of a resident principal: "Another thing, if you live in a small town, you expect to get some calls at night." Fred, as mentioned before, recognized this and did not reside in the community because he preferred not to conduct interviews at the curling rink.

Matthew, who had urban life experience, described one feature of a rural-school principal's work-life landscape: "Because you don't see movement within the [rural] population," he explained, "occasionally conflicts would arise between teachers and parents that were related to a parent's past experience with that teacher. In his school, he said, "There [were] students here who had grandparents go to the same school and some of them with the same teachers." In an urban school, he believed, it would be doubtful that this would occur. Part of a rural-school principal's work life might be the necessity, as it had been for him, to intervene in issues that began when a parent or grandparent was previously taught by the same teacher and it still seemed "to be an issue with the student."

Student-Related

Lawrence and Fred, whose schools were located in communities relatively close to a major urban city, both agreed that their work lives were influenced by differences between children of established families and those from recently arrived, relatively transient families. In the community in which his school is located, Fred said:

> Most of the population has been here for a long period of time, and, generally speaking, we don't have any problem with their kids. It's the new families that have moved in the last two or three years that give us the majority of the work because their children either have behaviour problems or there's some social service issues. I know the parents may be unemployed and just here on welfare because of lower cost of housing.

Lawrence also said that rural communities were often less expensive to live in than urban communities were. In his words:

> The town itself is a very inexpensive place to live, as a lot of these communities are. And so a lot of the families move out here for that reason. To be blunt we get a lot of dysfunctional families in the town. It's like taking an inner-city school and dropping it in the middle of a field, so we have a higher incidence of needy kids out here. The rural community is very strong. It's just the opposite: very strong families, very strong religion.

Fred explained, however, that although some of the families new to the community were "the five percent of the population that [caused] ninety-five percent of the problems," he thought that he had "less of those issues to deal with personally than they [did] in the urban centres." Consequently, he said, "I will definitely be staying in a rural setting."

All participants echoed Fred's statement about the general civility and behaviour of rural-school students. They concurred that rural-school principals would likely have to deal with fewer and less severe discipline problems than their urban counterparts. As Matthew said, "We don't have to face some of the realities like drugs or gangs." In fact, the generally well mannered behaviour of rural-school students was one of the characteristics of a rural-school principal's work-life landscape that future principals would likely find attractive.

Resource Management

Many features of the work-life landscape relate to the financial or budgetary attributes of the rural-school assignment. As Matthew, a first-year principal, spoke about the nature of a rural-school principal's work-life: "I think the one thing that stands out to me is the site-based budget requirements." In fact, participants agreed that almost *every* aspect of a rural-school principal's work-life landscape was influenced by financial considerations. Within this section I have chosen to present some of the financial characteristics of the landscape under the headings Funding

Issues, Program Decisions, School Viability, and Management of the Budget. Additional financial characteristics are presented under other specific headings within this chapter.

Funding Issues

Part of the work-life landscape of rural-school principals involved, because funding was based on a school's student population, the annual requirement to make budgetary decisions about programming and staffing. For example, Fred, principal of a K-6 school, described a neighbouring school's decision to offer an alternative program and the impact that competition had on his school's budget. Because funding in Alberta is based on the number of students, with schools receiving approximately $4,000 in funding per student, the loss of students reduces the budget, he said the neighbouring school had attracted about 12 students who formerly had attended his school. He added, "We lost probably about forty thousand dollars from our budget; and, of course, instead of having nine classes, it made eight classes, and a couple of those classes were very large." On the other hand, Lawrence, principal of a school in which enrolment had been declining prior to his appointment, spoke about the financial impact of his decision to offer an alternative program:

> The trend was that the students were heading to the larger centres, and this school was dying like so many rural schools. Trying to maintain the school financially was a problem. So I was pretty well free to do what I could to try and get the kids back into the school and make it work. So I advertised and tried [an alternative] program. I had the freedom to take that risk, and they were willing to help me. And as a result, we lucked out. That's what the community wanted. The kids are coming back. The population is back up.

Participants also spoke about the financial implications of the collaboratively made, districtwide decisions to provide access to services out of each school's per-student allotment. Yvonne, principal of a 75-student school, spoke, for example, about

the dilemma that rural-school administrators face when making decisions about hiring a district computer technology person:

> We don't have a tech person, because administrators have said, "We don't want one." and some are saying, "We want one." Sometimes you just have to bite the bullet and say, "Hey, you're having a tech person, and it's coming off your budget because there's all those problems."

But on the other hand, when she had stated that all principals would likely require more time to complete administrative tasks and attend growth activities, she said that funding to provide for that time could not be "at the expense of money," from her school's budget. As another example, Fred commented that his jurisdiction had decided to supplement the budget of schools with less than 135 students to provide administrative time for the principals of those schools. The funds for this decision had been provided, he said, from a pool of dollars that had been already removed from each school's per-student allocation. When asked where the funds for the admin-time decision originated and the impact that it might have on his school's budget, Fred said that "money was already taken out of us anyway. I guess it could have an impact on next year's budget allocation process."

Some participants spoke about the difficult nature of site-based financial decisions that rural-school staffs often encountered. Fred illustrated this when he spoke about a dilemma that his staff had experienced. They had already purchased and amortized equipment for a computer lab and had to contemplate a decision to replace an ageing photocopier. They decided, he said, "to patch the old one up" and "wait and see how things turn out—to give it a try for another month." However, with adequate resources, Fred expressed the opinion that his staff would have amortized the purchase of a new photocopier also.

Norman spoke about the potential impact of budget decisions and a rural-school principal's emotional well-being. He believed that because a principal's success

is often judged by others' perception of the financially driven decisions that are made at the school, the amount of funds that a principal received to operate the school could also influence a "principal's decision to stay." He said:

> Sometimes you're looked upon as a good or a bad administrator in terms of what you do in relation to the school. But, what you do is influenced by how much money you have. It's a detriment if you've got a small amount of money because there's not much you can do with it.

There is "another side," he stated. A principal could win support by saying, "Look at what we're able to do with this small amount of money." Yvonne spoke about "all the prioritising" that rural-school principals have to do. She identified the implications of the financial realities of her work-life when she said that she was always

> agonising over what has to be cut, what has to be made do with because of the prioritising or the lack of funds, and the lack of time in which to get things done. I'm finding that I'm getting better at saying, "I'm not going to get that done today, and I'm going to have to do it another time."

But, as Yvonne remarked, "For your own sanity you realize that you have to . . . [put] it on a back burner, [because] all of the things on an administrator's plate and a lack of time to complete them can cause considerable emotional stress."

Participants often directed comments to the Alberta Department of Learning. Matthew, principal of a small K-12 school, stated, "The way the Alberta Learning funding formulas exist now, we very much seem to focus almost entirely on economic reasoning for making decisions." David, also a principal of a small K-12 school, said, "There are costs of running a school and operating a school that are going to be the same no matter whether you have fifty high school students or a thousand high school students." He said that the Alberta Department of Learning had to recognize this and make extra dollars available for the rural areas.

Program Decisions

Participants concurred that an integral part of a rural-school principal's work-life landscape would likely involve making decisions about the type and structure of programs that would be offered.

Rural-school principals, because of enrolments, would likely be required to make decisions about combining classes. In this regard, part of the work-life of a rural-school principal, as principal David said, was "a balancing act between keeping parents happy and teachers happy." Decisions, for example, to split or combine classes would, he said, be one of the "things that administrators in elementary schools [were] going to have to face." As illustrated by his comment, some of these decisions may not have been in the best interests of the children, and he reissued an appeal to the Alberta Department of Learning:

> Elementary is definitely important. That's where we lay the foundation for learning. My philosophy would be that a Grade One class should be an entity on its own if at all possible. I have fought hard and long for that. This year despite all my beliefs I couldn't do it. I have nine Grade One kids. How do I make a class of Grade One that has nine students in it when I'm going to have a combination some place else that has twenty-nine or thirty-four or something like that? I just couldn't. I don't know. I think, as I said, we just need to let Alberta Learning know that there are some concerns out here and they need to address them.

When he referred to a similar circumstance at his school, principal Fred observed that "until we get more dollars coming down to the schools to have more teachers in front of the students," decisions about combining classes were "still going to be stressful for administrators." Human resource officer Eleanor said, "Combined classes exist in the high school as well. It proves to be very challenging when it comes to timetabling and budget." She commented that principals of multidivision schools were having difficulty specifically with the newly mandated high school applied and pure math programs. As she said:

> Before you could combine the Math 10 and 13, or 13, 23. But there's no way that anybody's seen how you'd combine pure and applied math classes. That is really causing a lot of difficulty, and it's a real challenge for administration; also the bridging courses. Financially, it's just not feasible.

Another role on the work-life landscape of a rural-school principal, David said, would likely be "to explore other avenues of offering classes in a small school . . . and plan alternate methods of instruction." He spoke about the additional costs involved in offering a Physics 20 course through videoconferencing. He described the cost of long distance telephone calls, the cost of the equipment that had to be rented or bought, and the cost of hiring a consultant. The project also required, he said, schools to coordinate participating students' timetables. However, he added, "The experience we had was less than perfect mainly because of the glitches with technology. Out in rural Alberta our telephone lines aren't very good, so we had some problems in that regard." Norman spoke about a typical rural-school alternate program when he described a mechanics program that, as he said, "we lost money on." But, he added, "I've got six kids—one was a potential drop out—who attended Tuesday evenings and Saturdays for eight weeks." He acknowledged that he had made a program decision to reduce administration time and assign teaching time to himself to be able to provide funding for programs like that.

School Viability

Participants agreed that a rural-school principalship would be more appealing if rural schools were seen as practical alternatives to larger schools. However, another aspect of a rural-school principal's work-life landscape was dealing with issues related to keeping these smaller rural schools viable—keeping them open.

The nature of discussions, debates, and decisions about keeping rural schools operational constituted a significant component of many of the principal participants' work lives. Because Lawrence's school was becoming less viable, he had provided

alternate programming to increase his school population. He implied the political risk-taking nature of his decision when he said, "We lucked out. That's what the community wanted." On the other hand, at his school Fred had to reduce the number of classes from nine to eight (one could say that his school became less viable) as a result of an alternate programming decision by a neighbouring school's principal. Matthew, a principal of a K-12 school with a small high school population located 15 minutes from a much larger community with two larger high schools, identified another concern. If he did not have the enrolment to offer a Math 10 Applied course one year, he would not be able to have a Math 10/20 Applied combined class the following year. Matthew explained the paradoxical nature of financial and program decisions that were a regular part of his work life. As more students attended the neighbouring schools, his small school became less viable:

> They say they want their children to come to school here, and yet they complain about the ability of the school to offer the programs we're offering. I've mentioned in a school council meeting that people will get what they wish for. If they don't support the school, it won't be here.

Yvonne, principal of a 75-student K-8 school, stated that a part of her work life involved numerous school-council discussions about keeping her rural school viable. She spoke about the political struggle to renovate her school following regionalization and speculated about how the new region might have been willing to sacrifice the old school building in her community to keep the neighbouring school "viable and alive." "But," she said, "because local people fought for this building to be renovated and upgraded, I think . . . it's worth their while keeping it going."

Human resource officer Edward, whose jurisdiction was sparsely populated, spoke about the political nature of the school closures in his rural area. He explained that "we're under the old mindset—too many schools, [and] too many schools means

closing [some]. It will be interesting to see what happens." With fewer schools, he added:

> We might be able to be like our neighbours to the north of us who have schools clustered as opposed to ours spread out like measles. They get economies of scale from being able to cluster. We've got thirteen high schools, they've got five, and so they're able to do things we're not able to do.

He further explained that any decisions to close schools would be difficult political ones made by the school board with input from the communities. As a result of the reality of these viability issues brought about by, as Edward said, "declining enrolment and increased cost of teachers," a rural-school principal's work life also entailed staff reduction responsibilities. "I've got one principal," he stated, "that's cutting one and a half teachers right now and is going to have to cut a teacher next year." When Matthew discussed staff cuts, he expressed the following opinion:

> One of the things I never wanted was to have to be involved in cuts. And in this division, in the rural schools at any rate, that's going to be a reality almost every year. The population base is declining. That's just a fact. And that has a direct impact on the school population and therefore staffing.

Management of the Budget

Another financial attribute of rural-school principals' work lives, participants concurred, was the management of the school's budget. They spoke about the collaborative process involved in the development and supervision of the school-based budget.

Site-based budgeting, site-based decision making, and site-based management were all expressions that described relatively recent decision-making responsibilities for some rural-school principals. As David, an experienced principal, said, "Site-based management is one of the latest things that is happening. We're responsible for the budget and some of the things that have to be considered in the budget." Matthew, a first-year principal, said, "I don't think that you could have a situation that I'm in, a

K-12 school, and not have site-based management." Edward's statement that "we expect our principals to be doing school-based budgeting through committee" described his jurisdiction's view of this decision-making process. As illustrated by David's statement, participants observed that they "spend time talking about budgeting and some of the things that have to be considered in the budget" with staff members. All participants indicated that developing and maintaining a collaborative and consensual budget decision-making process was an important aspect of a rural-school principal's work life.

Fred added that "management of the budget in the smaller school" created "more demands on your time because you don't have a bookkeeper." Edward also illustrated the significance of the bookkeeping or accounting aspect of school-based budget management when he stated, "Every time we get some funding, they tack on this form and that form and this measure and that target, . . . and it's simply more and more work with less and less time." Because managing the budget is a part of the rural-school principal's role, David said, "We need to have basic accounting skills so we can balance books and prepare budgets and understand the financial statements when they come from central office and so on." Because he liked numbers, Norman said that "site-based management, dealing with money and so on," was enjoyable for him. He said some rural-school principals who were "more into the humanities and would like somebody else to do the money" would, unfortunately, have to do their own budget. Finally, Yvonne highlighted the importance of a rural-school principal's accounting proficiency. She believed, as jurisdictional-office records indicated, that she had carried forward a deficit from the previous year. When she carefully examined the final audit figures she "discovered an accounting error at central office which revealed that [she] did not have a deficit at all."

Special Education Issues

Participants agreed that having to contend with issues surrounding the delivery of services to Special Education children consumed a considerable amount of the work life of a rural-school principal. Their comments are presented under the following two headings: Funding Issues and Operational Difficulties.

Funding Issues

Lawrence said that because there were a lot of dysfunctional families in the town that his school serves, there were a lot of special-needs children in his school. He added that because of the Special Education funding process, there were "a lot of very needy kids that [didn't] qualify for anything." He said that the parents still expected the school to provide a program for those children, and the school therefore had to "come up with unique ways to put it together." As well, he added, "We don't have the supports that a larger centre has." Elaine, who also found that there were a lot of special-needs students in her school, said, "The funding is so limited we [had] to learn how to manipulate funds to accommodate" these students. Yvonne also had a special-needs student who did not qualify for funding. She believed that, regardless of the lack of funding, "for everybody's sanity, the kids in the class as much as the child themselves," she had to provide funding for some teacher-assistant time for that child. Finally, when speaking about having a full-time aide for a child with severe disabilities who did qualify for funding, Yvonne said, "The money really isn't there to support" the child. She said that although she had paid the teacher's aide approximately $20,000, she had received only about $9,000 of special funding.

Operational Issues

One of the difficulties with the delivery of Special Education services was, as Edward said, that "most administrators are not trained in that area or don't have the

background in that area." He maintained that a rural-school principal would "have to be acclimatized" to the requirements for Special Education programming and would have to learn what would be required to meet those children's needs. Matthew, a first-year principal, said that he had no experience with the Alberta Department of Learning's Special Education coding procedures. He said, "Ultimately I'm responsible for that." He also identified the requirement for the development of Individual Program Plans as being something with which he had no experience because he had never had to prepare one himself. Lawrence, a second-year principal, explained that he had "tried to learn all the theory," but when he had been faced with actual Special Education cases, he felt that the theory was not sufficient and that he had to learn through experience. David, an experienced principal, said that future rural-school principals would "need to know about Special Ed funding," especially the nature of funding such as Program Unit Funding (PUF).

Time was another difficulty. All principal participants concurred that ensuring that special students receive adequate programming and support required a great deal of their time. Because of his teaching assignment, Matthew contended that interaction with outside agencies took much after-hours time. He spoke about having to attend a meeting at 5:45 in the afternoon to meet with a parent and Alberta Mental Health personnel. Principal participants also spoke about the time required to communicate with parents or guardians of special needs children, and human resource officer Edward mentioned "the onerous demands on an administrator's time," especially "in those cases where there's conflict with the advocates" of special needs children.

Eleanor said that she agreed that "Special Ed creates difficulties for rural-school principals." However, she said, "If you have parents of a Special Ed child who [are] prepared to work with you and to be reasonable;" and if the parents understood that the rural-school staff had provided the very best program that they could, it would "make it much easier." She stated that when she has had the parent "on our side" and

agreed to "do the best we can with what we have," the programs have been very successful. However, she said, "if you know you're up against somebody that takes you to a ministerial review every time you turn around," it would become difficult to "work under that pressure," especially, she said, "when you don't have the resources to begin with." Edward said, "All of the due process" that a principal had to go through was "extremely frustrating." He said, "The advocates seem to have all the rights on their side, and there's no rights for the teacher and the administrator."

David, principal of a K-12 school, spoke about the difference between Special Ed programs in elementary and secondary. In his school there were "more Special Ed kids in elementary than in junior/senior high." The reason for this was that once the students "get to junior and senior high, you can start to stream them a little bit. . . . So," he said, "we have to have programming options for the Special Ed kids." Elaine, also principal of a K-12 school, observed that secondary teachers have a different attitude about Special Education than elementary teachers do. She said, "Mentalities are different in elementary"; for example, high school teachers "lag behind in making IPPs [Individual Program Plans]." She said that "they make accommodations" for Special Education students, "but they don't feel it's necessary to put them on paper."

Finally, Edward said that one of the Special Education challenges rural-school principals faced was that they "don't have the ancillary services either." Because they are not able to access the expertise that "urban colleagues talk about, it becomes an enormous challenge in a rural area. . . . It is just absolutely frustrating" when a parent refers to an IPP and demands that the principal provide ancillary services when they are not available. "In our opinion," he said, "some of the demands of the parents are unrealistic." But, he commented, in the parents' opinion the schools and the jurisdiction should have been providing these services.

Administrative-Conflict Attributes

Participants concurred that struggling with personal and interpersonal conflicts was another one of the attributes of their work lives. I have classified these under the following four general headings: Leadership Conflicts, Teaching/Administration Conflicts, Staff Conflicts, and Assignment Conflicts.

Leadership Conflicts

Participants spoke about the conflict between management tasks and leadership tasks. Matthew, principal of a K-12 school, said that he was "finding the paperwork incredible." He added, "It's because of grade levels, not the population. . . . The priorities have to be leadership first, management second." And, he continued:

> I know good management is the responsibility of a good leader, but I'm not going to be swimming in paperwork and not doing the important things like discipline or helping students out, or sitting and talking to a staff member because they need to vent, or missing activities. I have to admit that I believe that leadership comes first, and I will sacrifice some paperwork for the leadership aspects. Someone told me that you do people work during people hours and paperwork during paper hours.

Because of this philosophy, Matthew said that he had spent at least 10 hours a day at the school. Fred agreed with Matthew: "There's a difficulty getting to leadership things when management things take so much time. That's one of the things a lot of principals grapple with."

Participants spoke about ways that the numerous demands on a rural-school principal's work life interfered with their leadership role. David said that after 30 years' experience as a teacher and an administrator, he had "not seen a decline in responsibilities" and that he could "only expect that more things [were] going to continue to be thrown our way." Because of "all the accountability requirements—the three-year education plans, the annual education report," the resulting analysis, and follow-up goal setting—Eleanor said, "We're going to have to teach people business

planning, business analysis, and evaluation." Fred spoke about the conflict between being a school leader and "the increasing demands in terms of being a social worker and everything else," and he added, "I feel that administrators have to have adequate time to do their job."

Teaching/Administration Conflicts

A significant aspect of most rural-school principals' work lives was their responsibility for teaching students. As Matthew said, in a rural school "you're teaching a lot." In fact, he said, because of staffing considerations, "in a rural school you have to [teach]." Fred pointed out the conflict between administration and teaching responsibilities when he said that there was a possibility of "spending too much time in the classroom and not enough time supporting staff and dealing with students and parents." He lamented that some of these administrators worked 60 hours a week. Yvonne, who taught 0.875 FTE, expressed concern about the adequacy of her teaching function in light of her administrative responsibilities.

> I love teaching; don't get me wrong. In fact, probably some of the best parts of my day are in the classroom. But I sometimes feel that I go in there a little less prepared than I would want to be because of the demands of the other part of my job. I've become very good at being a stand-up teacher.

Yvonne also spoke about conflict between the principal's desire to provide the best program for students and her management task of balancing the budget:

> You go into administration because you love kids. You want to organize them. You want to give them the best program. You've done your courses on the school culture and so on, and you want to influence that. You want to make it a good place for kids to want to be. And the other side of that is the money, the budgeting aspect.

To balance the school's budget, Yvonne pointed out another aspect of the teaching/administrative conflict. She spoke about the tendency for rural-school principals to reduce administrative time and assign themselves more teaching

responsibilities to provide programming for their students. She cautioned that these reductions of administration time, combined with increased teaching and administrative responsibilities, would likely have a tremendous impact on a rural-school principal's health. "The government and then the boards [would] have to recognize that they have to give enough time for these administrators to stay with their heads above water." She concluded that she would "like to try a bigger school," because, she said, "it would give [her] more administration time," the job would be similar, and she would have the "opportunity to do the job properly."

Another aspect of the teaching/administration responsibility conflict that rural-school principals faced was the time that was required for them to attend district or provincially prescribed meetings as well as professional growth workshops or conferences. Norman said, "If the principal was away too much, the teachers [and students might] feel that the person really [didn't] care." Participants also pointed out that not only would they be away from their administrative assignments to attend these meetings, but they would also be away from the teaching assignment that many participants had. Attendance at these meetings or workshops added the financial cost of hiring a substitute teacher and often involved considerable personal travel time and expense.

Participants agreed, as exemplified by Yvonne's statement, that when it comes to alleviating the administration/teaching conflicts, "it boils down to paying for people" and the "time to do the job properly."

Staff Conflicts

Some participants indicated that staff conflicts were a normal part of their work life. Elaine, a second-year principal, said that having "the support of the staff [was] half the battle." When the students "get into trouble, I can easily forgive them because they are only learning." However, she said, "what I find hard to deal with is

adults who cause problems [and] fly off the handle." She added, "That's really tough" to deal with, "because I figure they should know better." Norman, an experienced principal, said that because of the "the nature of human beings," there would likely always be "one or two staff that I'm going to be in conflict with." He added that principals "could work [themselves] into the ground trying to solve personality-conflict problems that can't really [be] solved." Despite that, he said, "it's the responsibility of the administration to find a way that works." Yvonne, an experienced principal, said that, "teacher/administration conflicts really play a lot on administrators' minds." But, she added, "if we hire right" and provide "lots of contact with other professionals— mentoring—. . . we won't have the conflicts."

Matthew, a first-year principal, spoke about a personal philosophical change that he had experienced. He said at first his "personal belief was that [he was] a teacher who had administrative responsibilities." He had come to understand that he was instead "an administrator who [was] teaching. . . . I'd like to think of myself as a teacher," but in reality, he said, "I [was] their supervisor, and I [would] have to make decisions where some people [would] get upset." He concluded, "You can be an administrator who doesn't teach or an administrator who teaches, but you're still an administrator."

Finally, participants spoke about the difficult conflict-laden nature of dealing with marginal or incompetent teachers. Participants spoke about the effect that these rare and sometimes confrontational matters had on themselves and their staffs. They acknowledged that administrator-staff conflicts, although stressful, were a regular part of their work lives.

Assignment Conflicts

Three of the participants were neophyte principals of multidivision schools, and they spoke about being assigned to a school with students they were neither

trained to teach, nor had they had any previous experience with teaching or supervising them.

Lawrence, who was trained for secondary teaching and had previous experience teaching in secondary grades, said, "The elementary was a huge learning curve for me the first year. I had a lot to learn." Although he found that "the elementary was easier than the junior high," he said that dealing with elementary grades was all "new to him," and he had to learn through experience. Matthew, who was also secondary trained, said that Grade 8 was the lowest grade level that he had ever taught. His school was "primarily an elementary school," and yet, he continued, he had "no experience with elementary students." He expanded, "I had no understanding of what PUF, Special Ed coding, or IPPs [were]." He said he had not known the "curriculum for the elementary school well," and he hadn't known what was "important to elementary teachers." He added, "When you were used to teaching adolescents who [would] openly defy you, and you have to be an extremely good classroom manager, . . . or you're used to dealing with serious issues [like] drugs, alcohol, [and] physical threats," it seemed trivial when someone asked him to deal with an elementary student who would not tie his/her shoes or had used profanity off the school property.

On the other hand, Elaine, who was elementary trained, said, "There's a big difference," between elementary and secondary. She stated:

> Some principals worry about the lack of knowledge of curriculum in the elementary areas. I know the elementary curriculum well. I mean, even when it's changing I can still keep up, because I know what was there. Where I have the trouble is with the high school. . . . I've had to work hard to learn the curriculum in high school. I've also had to learn all about credits.

She noted that there was a difference between a high school teacher and an elementary teacher. Elementary teachers' hearts, she said, "rule [their] actions, and high school teachers' "actions rule [their] hearts," and they seemed to "distance themselves better."

Staff Personnel

Many facets of a rural-school principal's work life were clustered around responsibilities that related to the management and supervision of teaching staff. Participants spoke about the nature of rural-school teaching assignments and the related timetabling requirements, their responsibilities for providing for and evaluating the teaching staff, and the importance of developing and maintaining a cooperative relationship with these people.

Nature of Rural Teaching Assignments

Participants generally believed that because of the nature of the demographics in rural schools, rural-school teachers would likely expect to be assigned to teach a variety of classes and assume additional responsibilities as well.

Because one of Matthew's teachers was teaching Math 10, Math 13, and Math 14 in the same room at the same time, he expected that the teacher would soon become dissatisfied, and he would likely have to hire another teacher in the very near future. David gave another example:

> Let's suppose I'm a science teacher. I have to teach Grade 8 science, Grade 9 science, I'm responsible for the Grade 10 science: 10 and 14. Then I've got chemistry, and depending on the year, I've got Chemistry 20 in semester one and 30 in semester two, or maybe it's cycled. Then I've got Physics 20, Physics 30, Biology 20, and Biology 30. Man, I've got many classes to prepare for.

He said, "I know that we have lost teachers because they are going to an area where there were fewer classes to prepare for," and, he added, they are required to do "less supervision of students." Participants remarked that elementary teachers were also required to prepare for and teach a variety of subjects, especially when they were assigned to multiple-graded classes.

Timetabling

Principals of multidivision rural schools spoke about the nature of their timetabling responsibilities in relation to the variety and number of combined classes. David, principal of a K-12 school, said that timetabling was "a crucial thing," because "the school has to be able to deploy staff" in a way that maximizes students' opportunity for continuous growth "from Grade One up to a high school diploma." He spoke about a dilemma he experienced with decisions to combine elementary classes because, he said, "elementary is definitely important. That's where we lay the foundation for learning." His particular dilemma was between having a very small class of nine Grade 1 children and balancing that with creating a large combined class of 30 plus somewhere else. Like David, other participants who were principals of multidivision schools were faced with similar secondary/elementary conundrums. Yvonne spoke about the dilemmas of situations where, "in order for them to be able to offer nine kids Physics 30," a school would need to have a combined class of 30 elementary kids.

Matthew, David, and Norman, K-12 principals, all spoke about difficulties that they experienced with timetabling the recently mandated applied and pure math courses. They all spoke about difficulties that they encountered when they offered these courses in combined classes or had them cycled from semester to semester and/or year to year. Matthew said that if he had not been able to offer Math 10 Applied this year, he would not have been able to combine Math 10 Applied with Math 20 Applied to offer it next year. David and Matthew mentioned another aspect of timetabling courses for rural schools when they spoke about the possibility of timetabling either video-conference or email chat-line courses. As Matthew said, "That's not something a city school would even consider."

David appealed to the Alberta Department of Learning to address the unique concerns of rural schools: "I think that we need to shout loud and hard about [them] and let people—the powers that be—know that we've got unique concerns in a small school."

> We need to say, "Listen, there are schools out here that exist outside of the cities." I'm positive that some of the decisions that are made are made thinking that every school is going to work like [a large urban school], but it can't possibly work like that in all schools. Getting back to the example of the applied math, we've got a number of students who are going to take pure math. We've got a number of students who are going to take the Math 14 and 24. If I've only got two or three students who want the applied math, how am I going to offer another level of math when I have to be able to have all of the bridging courses that go along with it as well? You know this works in theory if you've got five hundred students or a thousand students because there'll be enough students to make up a class, but I don't have that luxury in a small school. We need to let them know that there are small schools out here that just can't possibly offer the things that you are trying to push down on us.

Providing Staff

Most participants asserted that rural-school principals were often faced with difficult decisions about providing staff for their schools. Yvonne, principal of a small K-8 school, stated that the Alberta Department of Learning touted a pupil-teacher ratio of approximately 17 students to one teacher as the norm. She said that although this ratio "[sounded] wonderful; it [didn't] note that it [included] everybody that [was] dealing with those children. . . . We did," she said, "have those lower pupil-teacher ratios. We [had] one class of seventeen, two of nineteen, and one of twenty in this school," But, she added, "they're split grades and tripled in the afternoon." On the other hand, she said that larger schools generally had class sizes of 25 or more students. "The reality [was]," she observed, "we [got] the money for the number of children that [were] in front of us," and the difficulty for small rural-school principals was that they "still [had] to provide staff and programming" equivalent to those

schools with 25 and more students per class. "We [had] to compromise," she added, "with staff cuts and triple grading." David, principal of a K-12 school, used a pupil-teacher ratio of 30 students to one teacher as his benchmark figure. He said that it would be "easy enough to have a class of thirty students as there might be in a larger school, except [we'd be] trying to teach three different subjects" to that group of 30. Finally, Matthew commented that his difficulty with staffing could have implications for his staying at his school (retention). He stated, "If I'm going to stay in administration, why not go into an environment that's more conducive to doing the job at a professional level without the barriers that seem to prevent it?" Examples of those barriers, he explained, were not being able to afford a full-time secretary and having to assign teachers to multigrade or multisubject classes because of "the size of the school and budget constraints." Part of the work life of a rural-school principal, then, would likely entail making difficult decisions about providing staff with limited resources.

Participants generally believed that rural-school principals often had difficulty filling teaching positions. Norman, whose school was situated within a community of approximately 5,000 people and was a two-hour drive from a major Alberta city, spoke about his experiences. Last year, he said, during "the first round of interviews we short-listed and interviewed four [candidates] for a Grade Two position." Even though, he said, "we offered the job to the first three," they all declined and "elected to stay in the city." In addition to that, he added, "Just recently we had a position here for a band teacher." Many people had expressed interest in the position, "but not one of them would leave the city." All participants from the neighbouring Spartan School Jurisdiction indicated that a team of personnel from their jurisdiction actively recruited teachers at recruitment fairs. As David, who took part in these teacher-recruitment activities, said, they went to "the University of Alberta, the University of Lethbridge, the University of Calgary, the University of Saskatoon, the University of Regina, and also went to Charlottetown, Prince Edward Island." Yvonne, who also took part in

these activities, recognized that "a mentality shift or a paradigm shift" had occurred, and, "instead of the region saying, 'We'll take you under these conditions,' the young teachers were now saying to the regions, 'What can you do for me?'"

On the other hand, Gordon, whose jurisdiction borders a major Alberta city, said that because of their location,

> We're not going to experience the same difficulties that the more rural school systems are going to experience because we can generate applications. These are going to be staff currently teaching in other school jurisdictions who want to move closer to a large urban [city]. . . . Even though we have schools in [rural communities], people are prepared to invest in going to those locations with the hope that they can still move within the organization.

However, he added, "We've found that teachers of 30-level courses . . . or teachers that are in specialized programs are probably going to be retiring in three to five years." He spoke about a trickle-down potential for "problems at the junior high level because we're going to have a number of junior high teachers who may want to move into the senior high area." He said that principals of schools had "a responsibility for human resource management in those areas." Principals will have to, as he said, "prepare and build that bench strength so that when somebody leaves, these programs [won't] die or the teachers [won't] have huge learning curves to prepare for them."

Another aspect of a rural-school principal's responsibility for ensuring that schools were staffed was the tendency for many rural teachers to want to move to locations closer to a major centre. Fred, whose school is located approximately 40 minutes from a major Alberta city, said that "a lot of the teachers [would] start here as first- or second-year teachers, but they simply [didn't] want to stay in the smaller communities; they all [wanted] to be in the larger communities." Rural schools, he added, "get people for one or two years or three years. They become really proficient teachers; then other opportunities come up in [larger centres], and these people are

gone." Yvonne, whose school was located two hours from the same major Alberta city, said, "Most of the new young people that come here want to get their feet wet in a small-school environment," and then "they want bigger challenges" and move to larger centres. As a result, she frequently had to hire new teachers. She remarked that even though she had been at the school for only five years, she was "the teacher that [had] been here the longest."

In summary, participants generally acknowledged that rural-school principals will likely experience challenges in their efforts to provide staff for their schools. School population demographics and budget constraints will likely require many rural-school principals to assign their teachers to multigrade classrooms and/or multisubject responsibilities. As a result of these extra responsibilities, and because rural areas may not appeal to some teachers, another significant attribute of a rural-school principal's work life will likely be tasks related to the ever-present need to hire or replace teaching staff.

Evaluating Staff

All participants indicated the prominence of their teacher evaluative and teacher supervisory role. As exemplified by David's comment when he described the duties of rural-school principals, "Another major responsibility is teacher evaluation or supervision—whatever term you want to call it." As a result of the significance of the role, he said that he had taken "different kinds of training on teacher evaluation techniques and a couple of other things that would help me with clinical supervision." Yvonne noted that the recent change in the provincial evaluation policy and the implementation of annual professional growth plans for experienced teachers had been "a big help in [her] situation." But, she pointed out, the evaluator role often becomes greater for a rural-school principal because of the spin-off effect of having to hire new teachers regularly. In her words, "Because I often get new young people out of

university, I'm looking at their full evaluations each year for two years in order for them to get their permanent certification."

Fred spoke about the difficult nature of helping marginal teachers. He felt that "with site-based leadership, . . . it's even tougher" to deal with marginal teachers. He added, "We know we've identified marginal teachers, and now this year we're putting in a lot of effort into improving these marginal teachers." But, he said, "We need good support [from central office] in terms of dealing with marginal teachers." The evaluative and supervisory role was a significant aspect of a rural-school principal's work life.

Releasing Staff

Participants observed that one of the more difficult attributes of staffing with which a rural-school principal had to deal with was releasing teaching staff either because of declining enrolments or because of incompetence. As indicated earlier, for example, Matthew said that he had "never wanted to be involved in cuts," and he indicated that it appeared to him that this would likely be "a reality almost every year." Fred also spoke about the difficult nature of terminating a teacher. He said:

> Sometimes you come into situations where you move to a school and you inherit people that should have been weeded out in the past and are not. Then, of course, the way things are now, it's even tougher and tougher to do that.

Eleanor said that "it was very, very difficult for me" to recommend the termination of a teacher. And she recalled that she had "seen several VPs leave administration because they couldn't make those tough decisions." She said that it would be easier for principals if they would "take the personalities out of it" and make the decision, "because it's educationally best for kids." Norman stated the opinion that it would be extremely important for "a hundred percent support from Central Office" in cases in which a principal felt required to recommend the termination of a teacher.

Developing and Maintaining Relationships

Interwoven within the content of all of the participant comments was that because of the close-knit nature of the rural-school culture, the belief that the development and maintenance of an amicable relationship with the school staff was an integral attribute of the work-life of a rural-school principal. Using human resource officer Gordon's words, rural-school principals "need to be people that are really in tune with staff members . . . [and] need to be able to deal with the staff well because issues are a little different." Many participants also spoke about addressing staff satisfaction issues in light of the complex nature of rural-school teaching assignments and the potential for teachers to want to move closer to large urban areas. This was again illustrated by Gordon: "We need administrators who are sensitive, . . . can work in a team way and provide [teachers] with support and alternatives that make them feel really happy about where they're working." Norman explained this relationship when he spoke about the importance of developing "the feeling of a family" in his school. As he said, "You do want cooperation, [and] if the . . . people in the school want to cooperate, it works much better," but, he added, there will always be conflict." However, he said, "there is a way to deal with [the conflict], and I think it's the responsibility of the administration to find a way [to increase the cooperation]."

Finally, as exemplified by Fred's comment, all participants spoke about the importance of establishing and maintaining a cooperative and collegial relationship because of the school-based decision-making attributes of the rural-school principalship. In his words, "If you want to be successful, you have to sit down with your staff and find out what some of the key issues are."

Curriculum and Instruction

As indicated in the literature review, the primary and secondary legislated responsibilities of an Alberta principal are to "provide instructional leadership in the

school" and to "ensure that the instruction provided by the teachers employed in the school is consistent with the courses of study and education programs prescribed" (Alberta School Act, 1988, cS-3 s15; 1994, c29 s7). Participants concurred that they experienced some unique challenges in regard to these two responsibilities. They spoke about their experiences with learning the prescribed programs and implementing the newly prescribed ones, as well as a need for assistance and support with the implementation of these new curriculums. Finally, they expressed opinions about the newly prescribed applied and pure math programs at the high school level. I present their statements clustered under three headings: Prescribed Program Responsibilities, Implementation Support, and Pure and Applied Math.

Prescribed Program Responsibilities

As mentioned previously, in their efforts to fulfill their instructional leadership role, the three neophyte principals, who coincidentally were principals of K-12 schools, spoke about the onerous nature of becoming familiar themselves with curriculums that were not congruent with their training and experience. Elaine said that she "had to work hard to learn the curriculum in high school," and Lawrence spoke of the "huge learning curve" that he experienced learning the elementary curriculum. The experienced K-12 principal participants, both secondary trained, spoke about strategies they utilized to familiarize themselves with prescribed elementary programs and offered suggestions for the preparation of future rural-school principals so that they too would be able to perform their instructional leadership function. As Norman said, "I'm not an elementary specialist, and I haven't gone into the theory." But, he said, "You learn from experience [to] listen to the teachers." In addition, he advised that future rural-school principals examine action research, use the Internet as a resource, and attend workshops and conferences to become educated in those areas with which they were unfamiliar.

All principal participants spoke about the challenges they faced ensuring the implementation of new Alberta Department of Learning mandated curriculums. As well, Edward, human resource officer of Spartan School Jurisdiction, illustrated this when he mentioned the difficulty experienced by principals in his jurisdiction. When they started looking at new curriculum implementation, he said, they realized that it would be difficult because it most cases the new curriculums would have to be implemented by teachers in multiple-graded classrooms. He added that "all the things that go along with curriculum change, [such as] the inservice and the whole budgeting aspect, [created] a massive change for rural teachers and rural administrators to try to keep on top of." Participants spoke about the impact of implementing the math, language learning, social studies, health, and physical education curriculums, as well as the information and communication technology outcomes.

Implementation Support

The nature of support for curriculum implementation was identified as an important aspect of a rural-school principal's work-life landscape. Fred illustrated this when he said that one of the tasks of principals "as site leaders, . . . [was] making sure this curriculum [was] effectively implemented." But, he added, "we need some significant support with curriculum [implementation]." This support would be "a key factor for the principals that are further away from the urban centres."

Participants spoke about, as Fred called it, "the double whammy" that many rural-school principals encountered because they had teaching assignments as well as administrative duties. Not only were they required to learn and implement the new curriculums themselves, but they also had to provide instructional leadership for others. Fred also illustrated the arduousness of curriculum implementation at the elementary level. Because elementary teachers generally taught most of the subjects to their students, they "experienced curriculum changes every year." When Elaine spoke

about curriculum change at the elementary level, she said, "I feel more and more is put on us, [and] that's just the curriculum part." Consequently, as exemplified by Fred's comment, "good support for curriculum implementations is critical." Participants believed that the support should likely be in the form of regional professional-development activities and curriculum-mapping or unit-planning workshops. However, Fred commented, it would be difficult for many rural-school principals to find the time for these workshops and activities.

Eleanor, human resource officer of Empress School Jurisdiction, expressed concern about the implementation of the information and communication technology outcome: "We're putting in all this money to train teachers that are probably going to retire soon, . . . [and] now we've got these new ones coming in" who, she said, know very little about the use of computers. She wanted to see some support in the form of some basic qualification so that jurisdictions would not continue to spend budget dollars to upgrade their teachers. She also would have liked to see a regular upgrading requirement for teachers to maintain their qualifications.

All participants agreed that some form of district and provincial support for the implementation of these new curriculums would be crucial in the future.

Pure and Applied Math

Participants who were principals of K-12 schools or were familiar with the experiences of rural high school principals all described difficulties with the implementation of the new applied and pure math high school curriculums. In a comment similar to one of Eleanor's that was cited in the section on financial attributes of the work-life of a rural-school principal, Edward, human resource officer of Spartan School Jurisdiction, said:

> When they originally got started looking at the pure math and applied math and bridging courses, it was just driving our principals crazy because it was not

> feasible. [The schools didn't] have the student numbers, [nor did they] have the staff.

Prompted by difficulties they had with implementing the high school pure and applied math curriculums, some participants directed comments to the Alberta Department of Learning. For example, David, principal of a K-12 school, said:

> I think that we have to shout loud and hard on a regular basis and let them know that there are small schools out here that just can't possibly offer the things that [they] are trying to push down on us.

Norman, principal of a K-12 school, discussed the problems that he had with the Alberta Department of Learning's approach to the mandated implementation of the curriculums and the fact that they seemed to have forgotten about one group of high school students:

> In theory all of this is very good; in practice it's chaos in this province. Why should Alberta Learning promote something that is good in theory, but they don't know whether it's going to make sense in practice? Look at the chaos that it's caused in rural schools. . . . I guess I'm annoyed trying to put something into place that isn't just what it should be. . . . Some of the applied math is very good, but this could have been done in a very different way. I think one goal was to have two math courses accepted by the universities. But they're forgetting one group of kids. [They're] missing your everyday kid . . . that couldn't do either one of these two maths. . . . [I] want to be able to give them what they deserve. And [I] can't give them that because [I'm] complying with [the Alberta Department of Learning]. I have a problem with that.

Finally, Matthew, also principal of a K-12 school, when referring to the difficulty he was experiencing, said, "My school is not the only one. I can name at least seven K-12 schools, four other ones in my division and three in a division I used to work at, that are having the same problems." He went on to say to the Alberta Department of Learning, "What's taken for granted at city schools [can] not be taken for granted in rural schools."

Summary

In this section participant descriptions of some of the characteristics of the work-life landscape of a rural-school principal were presented. One characteristic was the uniqueness and importance of a rural-school principal's interactions with students, parents, and members of the rural community at large. Another characteristic was the primacy of the financial/budgetary aspects, which indicated that future principals would likely spend a considerable amount of time and energy dealing with monetary issues as well as related site-based budget development and management responsibilities. A third characteristic that participants addressed was the nature of providing services to Special Education students in rural schools, which revealed that ensuring the delivery of services for Special Education students added considerable responsibility to the work life of a rural-school principal. Fourth, the participants recognized that dealing with conflicts was a part of their work-life landscape. They spoke about conflicts between aspects of their leadership role, about conflicts between their leadership tasks and their teaching duties, and about inevitable but unpleasant interpersonal staff conflicts and difficulties that they experienced because their training and experience had not been entirely congruent with their administrative placement. A fifth aspect they addressed was duties that related to the management and supervision of teaching staff. Participants contended that the nature of rural-school teaching assignments, together with the urban migratory propensity of young teachers, often created considerable responsibilities for recruiting and evaluating teaching staff. They identified the complexities of timetabling for multigrade or multisubject classrooms, the impact of their teacher evaluative and supervisory responsibilities, the awkwardness of the budgetary-driven release of staff, the difficult process of releasing incompetent teachers, and the essentiality of establishing an appropriate collaborative and shared decision-making relationship with the rural-school staff. A sixth work-life attribute

was their instructional leadership function. Some principals, especially those assigned to multidivision schools, recognized the unique challenge of having to personally become familiar with prescribed programs as part of their instructional leadership role as well as (for most) their classroom teaching role. To ensure that instruction is consistent with these prescribed courses of study, they generally suggested that future rural-school principals would likely require additional support for the implementation of new curriculums. Some participants expressed concern that perhaps the Alberta Department of Learning had not fully considered the unique nature of rural schools when it implemented some of the newly prescribed curriculums, especially the pure and applied math programs at the high school level.

CHAPTER 5

Findings Related to Recruitment and Retention

Introduction

As mentioned in the literature review, part of the impetus for this research was based on the Eckstrom and Fischer (1997) finding that rural superintendents strongly agreed that the quantity of qualified applicants for principal positions was decreasing (pp. 2-3). Consequently, to determine how to increase the quantity of applicants and recruit qualified people to rural principalship positions, participants were asked to reflect upon their own experiences and speculate about ways to encourage future qualified candidates to apply for rural-school principalships. In response, participants described characteristics of the rural-school principalship landscape that appealed to them, but they also spoke about those things on the landscape that they found unattractive. As well, because Eckstrom and Fisher found that rural superintendents had found that the number of experienced principals wishing to resign their positions was increasing (p. 4), I asked participants to speculate about the kinds of things that might encourage future principals to remain within rural schools and/or rural jurisdictions. Interestingly, I discovered that participant responses to questions about retention were often restatements of the recommendations they provided to the questions that were specifically related to the recruitment of future rural-school principals. Generally speaking then, when participants extrapolated those above-mentioned characteristics and/or conditions to the future, they affirmed that a jurisdiction's ability to recruit *and* retain rural-school principals would likely be directly related to its ability to make the work-life landscape of the rural-school principalship attractive to teachers and existing principals.

Making the Rural Principalship Attractive

The participants identified a multitude of components of the work-life landscape of a rural-school principal that would likely contribute to the attractiveness of the position. They mentioned characteristics they found appealing and offered suggestions for counterbalancing those that were not. These have been compiled, categorized and presented under five headings: celebrating the appeal of the rural context, providing financial incentives, providing other incentives, improving the viability of rural schools and recruiting people with a positive disposition toward rural schools.

Celebrating the Appeal of the Rural Context

Participants suggested that, in order to recruit and keep principals in rural schools, jurisdictions would need to highlight and celebrate the advantages of the rural context on two levels: (a) the advantages of living in a rural community, and (b) the advantages of being principal of a rural school.

Advantages of a Rural Community

There are, as David indicated, many reasons for living in and staying in a small community. He indicated that to get people interested in a small community, it would be important to "brag up the advantages" and "publicize the good points" of a small community.

Norman drew a parallel between difficulties that rural communities had experienced in convincing doctors to come to their communities and attracting rural-school principals. "I think we'll be facing relatively the same things as the doctors, but in a different tone." He felt that, like the hospital boards, rural jurisdictions "have to persuade people that there is quality of life here that is good and even exceeds the quality of life maybe in the cities." Fred believed that quality of life and personal

fulfillment were important for him as well. As he said, "Being able to live right in a small town is key." He said, "Generally, things in a rural environment are slower paced, [and] you're not going to have to worry about traffic flow." He added that he always emphasized to his staff the advantages of living in the community in which you teach. It is a luxury and a privilege, he said, to live, "only five minutes from work." Elaine advised that to keep quality-of-life aspects of the rural principalship attractive, it would be important for the rural communities to make principals feel as if they were a part of the community. "If you make a person a part of a community, it's harder to tear him apart from the community."

Participants highlighted other advantages. Eleanor said that a rural community was "a wonderful place to bring up your children." Norman, after reflecting on his eight years in his current rural-school position, said that his children had "found their niche" in the community, and because it was a relatively small town, it was "a good place to bring up kids." He added that another characteristic that prospective candidates would likely find attractive would be "the pollution-free environment" of a rural community, and, he said, jurisdictions should advertise this fact in their promotional literature.

Participants also contended that the cultural and recreational facilities would be attractive to prospective candidates. David said that some of the things that kept him in his rural community were hunting and golfing. In his words, "I like to hunt, and this is a good hunting area. I like to play golf, and we're within a half hour of a variety of golf courses." Norman felt that the opportunity to perform in live theatre was important to him.

Participants spoke about the effect that a rural community's proximity to a larger urban centre would likely have on prospective candidates. Gordon, whose jurisdiction borders a major city, observed that, because many prospective candidates found the location attractive, "we're probably not going to run into the same

difficulties as other school jurisdictions in this area." His jurisdiction would likely not experience the same difficulty in recruiting people as those jurisdictions that are further away from major centres would. He suggested that some people might even choose to migrate toward the large urban centre from the rural areas.

On the other hand, those principals who lived a distance away from a major city indicated that a one- or two-hour drive to a major Alberta city was "not that bad" and should be touted as an attractive feature for prospective candidates. David, a resident principal, remarked that there were drawbacks to being in a rural community. He explained, "You know, for example, if you want to go to a movie, they don't have a theatre here. If you want to buy a large quantity of groceries, we have a convenience store, which means the prices are high." However, he affirmed that he had purposefully chosen to reside in the rural community for the past 30 years.

In summary, to make the rural-school principalship attractive to prospective candidates, participants suggested that jurisdictions would need to, using David's words, "brag up" the advantages of being in a rural community.

Advantages of Being Principal of a Rural School

As exemplified by David's comment, to make the rural-school principalship attractive to potential leadership candidates, "the qualities of a small school have to be made known." Participants identified a number of attributes of a rural-school principalship that would likely be attractive to potential leadership aspirants.

Some respondents, as exemplified by Lawrence's and Matthew's statements, felt that being a principal of a rural school provided them with greater opportunities for personal and career growth, and that had appealed to them. Lawrence, for example, said that teachers who really wanted to be in administration would take a rural-school assignment. "They'll take anything to get started," and, he added, that opportunity would be "an incentive for new administrators who really want to be in

administration." Matthew, a K-12 principal in another jurisdiction, suggested that the career opportunities were an advantage and spoke about the advantage of the wide-range learning experience for him:

> The other advantage that I saw—the learning that goes on, I mean, when I'm finished here, . . . [I'll] have received experience in a middle school, an elementary school, and a high school. And I don't think you [would] get the intense learning and wide range as an administrator in a larger school that you [would] get in a smaller school.

However, as Lawrence indicated, he and some of his friends in administration viewed the rural assignment as only a stepping stone on their way to an urban school. He said, "We were willing to drive out here to get our foot into the door, into admin, with the idea of proving that we're good and then trying to get back into [a large centre]." Eleanor, as human resource officer, pointed out a dilemma that rural jurisdictions would likely experience. She recognized the potential career-advancement desires of some rural-school administrators and felt that a lack of opportunity would likely lead to dissatisfaction.

> Definitely I agreed with "career advancement opportunities appeal to some principals." And often times in rural Alberta you can figure it out. The principal is there and he's 49 years old, and his family's kind of going through the system and they're set. You know that you're not going to be principal of that school. And then you look around, and it's not hard to figure it out that there's not going to be any advancement. So then right there you lose some VPs because you can't promote them to principalships, because there's just not a large enough turnover.

Another advantage, participants agreed, would be the potential for greater opportunities for long-term stability. As principal Matthew said, "People who are looking at long-term stability (when I use the term stability I mean from a standpoint of movement) can get that more specifically in a rural setting."

Participants also explained that there were opportunities to continue teaching as principal of a rural school, and that might appeal to future rural-school

administrators. David expressed the opinion that the part of his job that he enjoyed the most was teaching. Matthew suggested that this might be seen as an advantage. As principal, he said,

> You're teaching a lot, which I think is an advantage. I love to teach. I think in many city schools that's just not a possibility. . . . I think for people who want to get into administration and yet still want to remain teachers, rural schools are an opportunity for doing that.

However, the perceived attractiveness of being able to teach may, in fact, be a deterrent for many contemplating a rural principalship, as illustrated by the comments of Yvonne (who taught 87.5% of the time):

> I love teaching, don't get me wrong. In fact, some of the best parts of my day are in the classroom. But I sometimes feel that I go in a little less prepared than I would want to be because of the demands of the other part of my job.

Participants expressed the opinion that a fourth advantage of being a principal in a rural school was that rural-school students were better behaved, more responsible, and consequently easier to manage. Fred said that, from his experience, rural students were "more responsible," and they were consequently better behaved. Matthew, who grew up in urban areas, pointed out that there does not seem to be the same level of drug use or violence in rural schools as in the larger urban schools. Eleanor, who had taught in a rural school, believed that knowing the parents and the children made discipline an easier task. She explained:

> Well, I guess the thing is, is the fact because we're small you really get to know the clientele. You get to know the parents, you get to know the kids, and it's a lot easier to discipline, to work with people when you know what's going on at home. You don't have the big-city problems.

The ability to form a close relationship with staff, parents, and students in rural schools was also cited as an advantage that would likely appeal to future rural-school principals. Lawrence, who said he had to "get involved with everything in

town," valued the trust that had developed between himself as principal and the community. "It's almost like a family," he said. "But I don't think you would develop such a relationship if [the school] was in [a major centre]." David, a resident principal, said, "You get to know everybody on a very personal basis," and although not "everybody agrees with everything that you do, there is fantastic community support." Principal Fred spoke about his experience: "I've had really good staffs [and] excellent parent support. . . . The parents really buy into the small community school because it is the life blood of the community." As well, principal Matthew said, "I have to say the advantage is, there's no anonymity. You know all the kids very well. You're not dealing with a thousand students where you have to be aloof and removed given the situation."

Participants maintained that another advantage was the opportunity to make a significant difference as a rural-school principal. Matthew, principal of a 250-student, all-grades school, explained that teachers who genuinely want to make a difference would like the unique opportunities that being a rural-school principal provided. Elaine, principal of a 350-student, K-12 rural school, expressed the following opinion:

> When the school is smaller you have more to do with the students. And the more you have to do with the students, the more you can shape them to become young adults in the world. So I guess that it would depend on the person, if they want to be an influence on a child's life—'cause they really do.

As previously mentioned, Lawrence suggested that the rural-school principal was a highly involved and highly influential member of the community in which the school is located and implied the intrinsic attractiveness of that reality. He indicated that he knew all the businesses in the community, was involved in town council and when important events occurred in the community members ensured that he, as principal of the local school, was involved.

In summary, although there may be perceived disadvantages, the participants recommended that jurisdictions point out the advantages of being a rural-school principal.

Providing Financial Incentives

However, in addition to the appeal of the rural context, Edward brought forward two other circumstances that might make the rural principalship attractive for future candidates:

> If you were really thinking from a business prospective about hiring the best and keeping them, then you'd be looking at extrinsic and intrinsic rewards. And based on what we're paying our administrators, we've been lucky to keep them. I think probably more have stayed for other reasons.

Participants identified a number of finance-related incentives intended to counterbalance some of the unattractive aspects of a rural-school principalship. These are organized and presented under five categories: administrative allowance considerations, administrative time considerations, professional development considerations, rural compensation considerations, and travel considerations.

Administrative Allowance Considerations

Participants concurred that one of the factors that would likely influence potential candidate decisions to aspire to a rural-school principalship and influence existing rural-school principals to stay would be the amount of financial remuneration. Many felt that the a principal's administrative allowance (although improving) was not very attractive. Principal Matthew illustrated this point when he stated that although it was not a poorly paid job, it was not that much more than a teacher's income, and he wondered, "Why would anybody want to put in the extra effort" to go to university and/or receive the necessary training? Human resource officer Eleanor added that an administrator's allowance was not really much of an incentive when one considered the

extra amount of work required of a rural-school principal. She believed that the allowance would have to be greater than it currently was:

> If you wanted to get a part-time job or if you farmed or something, you'd make far more money than looking at a principalship. In order to attract more people, we've got to have the allowance so that it is more than the $50 a month that [principals] see on their paycheque—for the extra 10 hours a day they're putting in.

Some principals related anecdotes about staff with administrative potential not being willing to consider the position because of the administrative allowance. This was exemplified in Norman's comment about the reactions of a few aspiring vice-principals to an uncomfortable student-disciplinary incident with which Norman had had to deal:

> They looked at this incident, and one of them said, "I don't need those headaches." He looked at it and said, "I'd only be getting $2500 dollars extra a year, and I'd have all those headaches. I can earn $2500 in a different way."

Participants also suggested that the amount of the administrative allowance would likely encourage existing principals to remain in their rural schools. Lawrence, a non-resident principal who was contemplating a move to a school closer to home, intimated that the amount of a rural-school principal's administrative allowance might influence his decision to stay:

> I guess if my allowance increased substantially, I would certainly be willing to stay. I guess that's one of the reasons to be moving. If I moved to [a major centre] my allowance is built on students, and we have 200 students here. This is a small school. If I went to [a larger school] . . . [that] has 600 students, my allowance would almost double.

Participants agreed that part of the reason that teachers would not be willing to aspire to the rural principalship was because the administrative allowance was not attractive enough when compared to the amount of work and time required. As well, when compared to other professionals in similar positions with similar responsibilities

and similar education, some participants stressed that a rural-school principal's allowance was significantly lower and therefore less attractive and, consequently, likely to influence decisions to aspire to and/or remain in a rural principalship. Fred compared his allowance to those of friends employed in the private sector who were working in industrial plants and explained that his friends were getting significantly more than he was. As he said, "There's a massive difference." Lawrence noted that many people he knew had expressed the opinion that the number of after-tax dollars a rural-school principal's administrative allowance generates was not worth the extra responsibility when compared to the pay of management in industry.

Although financial remuneration was a concern, participants also indicated that one of the things that would be very important was the amount of time available to successfully complete the tasks of a rural-school principal.

Administrative Time Considerations

To make the principalship attractive to those teachers contemplating rural-school administrative positions and to those rural-school principals contemplating leaving their schools, some participants noted that there would need to be more time available to complete administrative and leadership tasks. Principal Yvonne, for example, expressed the opinion that jurisdictions would need to recognize "the overwhelming nature of the job" and provide "some kind of recompense for it." She added, "It doesn't have to be money. I think everybody wants time rather than money these days." David also felt that "the most important thing, I think, is time, [because] I just don't seem to have enough time in the day to get all of the work done that I need to do." Participants agreed that because a rural-school principal often experiences difficulty finding enough time to complete educational leadership tasks, the position may appear to be unattractive to potential candidates.

Further to the comments about administrative time, Yvonne observed that since regionalization and the implementation of site-based decision making, she had less administrative time. She stated that what appeared to have developed was an unwritten understanding that the principal's administrative time was reduced and teaching time was increased:

> I cut back on . . . my administration time because it affects one person, whereas other things often affect more people. I've struggled with that because I knew I was already struggling to keep on top of things. Once we had gone to site-based management with regionalization, the workload of the local administrator just doubled overnight, and yet there was no recognition of that in the time that was allocated.

Because she did not have enough time to dedicate to her administrative tasks, Yvonne (whose school has 75 students and no vice-principal) expressed the desire to work in a larger school, because she "would get more administration time, and get more opportunity to do the job properly." But even Norman, whose school had 530 students with two vice-principals, pointed out that "we're, as usual, pressured for time"; and when he had dealt with a particular student-discipline situation, the investigation "was all done after school and on Saturdays."

Matthew, who had been "averaging at least 12 hours a day" at his school, commented that the time commitments that were required to meet the responsibilities of his school were putting more demands on him and explained that

> at some point in time, you have to say, "No more!" from a time standpoint. I know I won't be doing my job effectively if I'm always tired or I'm always tired when I'm coming to work or I'm not spending time at home. Those things, I think, have to be addressed in some way.

Yvonne suggested that the Alberta Department of Learning and rural school jurisdictions would need to take the responsibility for addressing a rural-school principal's need to have adequate administrative time. She said, "It boils down to paying for people" and that if she had to reduce her administration time, she would not

be sure that she would be able to cope with the position. She asserted that "the government and then the boards have to recognize that they [will] have to give enough time for these administrators to stay with their heads above water." However, when asked if this time should be found at the expense of money, Yvonne commented, "Not at the expense of money. Absolutely not! I can't let any more money out of my coffers." Yvonne spoke about the stress level of a principal who taught 75% of the time, was running a high school, and had the additional responsibility of being the computer technician. She said that rural-school principals are "far, far too overworked." Consequently, she said, "The job does not look attractive to people." Therefore, she added, "To make it attractive they have to give more time for [administrative tasks] to be done effectively and efficiently so that people don't burn out."

Fred pointed out that his jurisdiction had already begun to address this issue. He said that, because his jurisdiction had recognized that small rural schools required assistance, they had allocated a minimum amount of administrative time for those schools with student populations of 135 students or less and a single administrator:

> I know our jurisdiction has already taken a step in the opposite direction to correct that for small school principals. In our jurisdiction we've got three schools that have 135 [students] or less, and what they've done is, they've made a special allocation (for the schools that only have one school administrator) so that these principals will [have] at least three-quarters [administration] time.

When questioned about the impact that this policy might have on his per-student allocation, Fred said that the policy would not impact this year's allocation (because it came from the central pool), but that it would likely decrease his per-student allocation the following year.

In addition to consideration for time to complete administrative tasks, Fred offered another suggestion that he surmised would be attractive to both rural-school

principalship candidates and existing rural-school principals. He said that, because he was aware of at least one urban jurisdiction with a similar policy in place, rural jurisdictions should consider implementing a policy that allowed principals to take some time off in lieu of the extra hours they spend at their schools. He used examples of principals with school-aged children who might want "to go to his or her child's field trip, or be the parent in their kindergarten class." He also suggested that the days-off-in-lieu would probably not affect a principal's taxable income and that this benefit would likely be attractive to rural-school principals.

In summary, to make the rural-school principalship attractive, participants emphasized that future rural-school principals would require adequate time to complete their administrative responsibilities. The concept of time off or days off in lieu of time spent was introduced as well.

In addition to the attractiveness of adequate time for administration or time off in lieu of time spent, participants perceived that financially assisted opportunities for professional growth would likely be attractive.

Professional Development Considerations

Most participants agreed that the ability to access financially supported professional development opportunities would likely encourage candidates to consider rural principalships and existing administrator to stay. Matthew spoke in support of a jurisdiction that provided meaningful and financially supported PD opportunities. In his words:

> A priority is meaningful professional development [and] not having to cut corners to do it. With teachers as well. In [name of school jurisdiction] every teacher, on a three-year rotation, is required to go on an international professional development conference. . . . Every year the administrators have to go to one, and on a three-year rotation all the teachers would. Now, I know there would be people that would die to do something like that. Yes, in one way it's sort of a fringe benefit. But it's a fringe benefit that impacts directly

> on the school, and it would make a difference. . . . And if divisions [come] out with things like that, you're going to keep people.

As evidenced by Fred's comment, all of the rural jurisdictions involved in the study have "financial resources in place to support administrators who want to take professional development," and the financial support does not come out of the school-based budget. David observed, "This year for example, I would say probably two thirds of the principals in [his jurisdiction] went to the Western Canada Ed Admin Conference in Edmonton."

David observed that his "school division likes administrators to work towards the master's degree or a doctorate degree, and a number of administrators in our area have taken that up and are doing that, but it's dollars out of their own pocket." He recalled that the reason that he himself had not pursued a master's degree was that he was paying for a house, and the cost of attending and loss of wages prevented him from doing so. Although the jurisdiction had been willing to provide financial help, it was not enough. He said, however, that

> there is some financial help available. The school division does have a bursary program. It's very minimal. You get a fraction of the fourth-year minimum on the salary grid. When we were trying to pay for a house, you know that's not going to be enough to pay the bills and keep the wolf away from the door. So it probably was the dollar aspect that was the [reason for] me not doing something.

David and Yvonne intimated that to increase the attractiveness of the rural principalship, jurisdictions should revisit or review their sabbatical policy for administrators and teachers. Lawrence suggested it would be a "good perk" for his jurisdiction to help offset the cost of graduate studies "to further my education and get financial support from the jurisdiction."

Fred pointed out that financial assistance for professional development should also include release time to attend these courses. He felt lucky to have a superintendent and deputy superintendent who gave him "time off to pursue the principalship

specialisation at the University of Alberta." He explained that these "opportunities for administrators are drying up because they're not being able to get the type of release time that I feel that they would need to take this type of training."

However, there is a dilemma in offering financial support for future administrators' professional development or pursuance of further education. As Eleanor pointed out, "We need to . . . get an incentive program for the teachers. And then again there's no guarantee that they are going to stay." Yvonne related an anecdote about "one person who's not with our region any more; . . . he left. And the region put a lot of energy, time, money into that young man. But did they really get their payback as it were?"

In the future, participants suggested that support for the pursuit of further education or opportunities to attend professional development activities in the form of financial assistance and release time would be important to both attract and keep rural-school principals.

In addition to consideration for professional growth, participants speculated that measures to compensate administrators for the inconvenience of living in a rural-school community might be attractive to rural-school principals and future principalship candidates.

Rural Compensation Considerations

In future, to make the rural-school principalship more attractive, participants indicated that jurisdictions might need to offer some form of compensation to rural-school principals and future principalship candidates who choose to live in the community where their school is located. David, who grew up in the community and is the principal of the school he attended, recalled that when he began his teaching career, he had lived in a teacherage. He suggested that, although the opportunity for

subsidized housing was no longer available, perhaps jurisdictions should reintroduce the incentive. He said:

> I lived in a teacherage. For a number of years the school divisions provided an incentive. I guess it was a break. You got a subsidized rate on housing, and it was expected at that time that if you taught in a community that you would live in that community. . . . So subsidized housing went the way of the dinosaur. Too bad, because I think it was a good incentive, something that maybe could be revisited.

Yvonne, who also had benefited from subsidized housing when she began her teaching career, agreed with David and further expanded that notion to other housing incentives to include subsidized moving expenses or rent-to-purchase opportunities. She also suggested that jurisdictions might consider providing something similar to the northern allowances that she and her husband had received when they came to Canada:

> When we first came to Canada in the late 60s we had housing provided—teacherages that we lived in those first few years. We went to the North, and we had what we called the northern allowance, which was supposed to be a little bit of extra money to allow us to travel out once in a while. [It was] sort of a bonus to attract us to stay.

She added that incentives such as having housing provided or opportunities to rent-to-own one's own housing, together with incentives, such as moving costs, that made the transition to a rural community easier, would be attractive to rural-school principals and future principalship candidates.

Lawrence, a second-year, non-resident principal, related an anecdote that was illustrative of other financial incentives that might be necessary to attract and keep rural-school principals. He spoke about meeting a fellow on an airplane who lived and worked in Grande Prairie. The fellow was the same age, had been married the same length of time, but was not university trained. The salary was comparable, but Lawrence felt that the "perks" he received were considerable:

> He was working in industry and he worked for a company up in Grande Prairie. . . . I asked him, "Why would you stay up there? Why would you stay in the middle of nowhere doing that job?" He said, "The job's great." And the incentives that he got were incredible. An example was, he went on a trip, and his wife's trip was paid for. That was an incentive for them. But I guess what it comes down to are the perks to stay out in a community like this.

Lawrence thought that perhaps some other form of incentive "perks" might be attractive to rural-school principals in the future. He also intimated that perhaps some sort of incentives that benefited the family (in this case the free trip for a spouse) might be attractive to future rural-school principals. He made an additional interesting observation about the nature of school as compared to business. He suggested that the Alberta Department of Learning seems to be attempting to compare education to the business sector, and "they're trying to make us look at it like a business." But, he said, "On one hand, if you want to run education like a business, there's that other side as well that goes with it, and the remuneration part, they've sort of forgot about that."

David suggested that consideration should be given to compensating those who choose rural-school principalships by restructuring the rural-school principals' administrative allowance. He pointed out that there was considerable variance in the size of rural schools, and, consequently, there was considerable difference in the amount of the rural-school principal's allowance. He proposed that to facilitate having quality people stay in the smaller schools, jurisdictions should "rework" the principal's allowance so that there would be less variance, and the allowance would be more indicative of the nature of the task and not of the population of the school. He said that the base amount might be higher and the per-student allocation lower to balance that allowance so that a small-school principal would be less likely to desire to move to a larger school or vice versa.

In summary, as Yvonne said, "Jurisdictions might consider offering incentives that would help make the transition to a rural community easier." Participants stated that, in all likelihood, providing compensation for or assistance with housing for those

principals who chose to reside in the community would likely counterbalance the difficulty in attracting qualified applicants to rural schools. Participants also noted that jurisdictions might consider offering other perks and/or modifying the rural-school administrative allowance to increase the attractiveness of the rural-school principalship.

Yvonne spoke about the northern travel allowance that she had received when she began teaching which compensated for her occasional trips out of the northern area. Other participants offered suggestions for financial incentives that would compensate for the amount of travel of rural-school principals and therefore make the position more attractive to rural-school principals and future principalship candidates.

Travel Considerations

Those principals who chose not to reside in the community in which their school was located were often concerned about the distance that they had to travel to and from their schools. Consequently, those participants agreed that distance and travel considerations would likely be an important consideration on two levels: to recruit qualified candidates to rural schools, and to retain current principals in their rural positions.

Lawrence, who had a one-way, 40-minute commute from his home in a major Alberta city to his school, remarked that some candidates, "no matter how bad they want to get into admin, they wouldn't drive like this." He believed that, as a result, it would likely be difficult to convince teachers to go to rural schools and prepare for a rural administrative position. As well, both Lawrence (in his second year as a principal) and Matthew (in his first year) were contemplating moving to larger centres in the near future. As Matthew said, "Two years is the time line," and that was partly because of his 45-minute-one-way commute each day. Lawrence said during the second interview that because of a substantial increase in fuel prices, his 1,000-kilometre-per-

week drive was becoming very costly. What was bothersome to him was not just the cost of travelling, but also the time that it took out of his day:

> The drive is long and expensive as well. I get an allowance for being an administrator, but I drive a thousand kilometres a week. Time is valuable, and a good portion of my allowance goes to my gas and maintaining my vehicle. . . . Actually, since you were here last time, I worked out my allowance, and my allowance goes to travel. But the incentive, the allowance that I get right now isn't extra dollars in my pocket to any large extent.

Lawrence, who had previously commented that he had been willing to accept a rural-school principalship as part of a career plan, also supposed that future commuting rural-school principals would likely be concerned about the length of time that they would be assigned to a rural school. He believed that future rural-school principals would likely be willing, as part of a career plan, to travel, providing that they knew that they would be able to move:

> The other problem too is, if you [are going] to move somewhere, how long are you going to be stuck there? If you [could] make a plan that three or four years down the road you could be closer to home, and in a larger school or a school of your choice, that would certainly alleviate some of the stress.

Fred, a non-resident principal, felt that having the freedom to live away from the school would keep some principals in the rural schools. He implied that jurisdictions might find it difficult to recruit candidates if they were to require their principals to live in the community in which their school is located:

> I think we can keep people that can come into the communities, act as administrators but still have the freedom to live somewhere else. If it ever became a condition of employment when you have to live there, it's hard to say how that would work out.

Yvonne recalled that jurisdictions used to require that their principals live in the community in which the school was located: "I remember maybe twenty, fifteen years ago, quite a furore . . . when the principal of one of the high schools there was living in another community; you know, the flak he got about that." Jurisdictions had

developed policies that "actually dictated that the principal had to live in the community." She expressed the opinion that, although those policies had gone "out the window" as soon as they became regionalized, this idea was "raising its head again" because rural communities would "certainly like their school leaders to live in their community." She said that in the future, because of the possibility of transfer or promotion, and because a principal's home and family may be located somewhere else, jurisdictions should not require principals to live in the community in which the school is located. She agreed with Fred that as long as rural-school principals were able to keep up with the job, they should not be required to live in the rural-school community and the school that their children attend should not be an issue:

> So I think there's got to be some open-mindedness to this fact that as long as they're doing the job and they're not reneging on any of their responsibilities, . . . if they're fulfilling all their expectations in that regard, then where they live shouldn't really be an issue. And where their children go to school shouldn't really be an issue. But what we're doing is, we're fighting tradition again, you see. Things are changing, but people's ideas don't necessarily change along with them.

Human resource officer Edward felt that rural jurisdictions simply could not require their principals to live in the community in which the school is located. He commented that during the selection process, jurisdictional trustees no longer asked the question, "Where are you going to live?" Human resource officer Gordon commented that, although not a requirement, the community would consider it a good thing and provide stability if teachers or administrators chose to live in the community in which their school is located:

> In fact, just this last week a couple of new probationary teachers (and this can still apply to principals) and their families have actually moved to the community, and so they saw that as a very positive thing—providing stability. And I would see the same for administrators, if they moved to the area. . . . So I guess it reinforces that whole concept that if you can get them living there and working there and being part of the community, it becomes more stable.

However, as Fred and Lawrence maintained, in the jurisdiction bordering a major Alberta city most of the rural principals were non-resident principals and consequently commuted to their schools. When asked by the researcher how the community felt about this situation, Gordon said that he had not "heard serious concerns about that because each of those principals [had] gone to great efforts to make connections with the community." Gordon also observed that, because the jurisdiction was located next to a major Alberta city and only a few of the jurisdiction's schools were located further than 40 minutes away from it, he did not feel that his jurisdiction would be providing mileage or financial incentives. Gordon saw another two-way dilemma. Resident principals, he said, were reluctant to move to another location because of the distance; and, on the other hand, non-resident principals were often anxious to transfer out of their rural schools and move closer to their residences because of the distance they travel. Assistant principals "looking to move to principalships [were] keeping within a radius of about forty minutes or so, [and] they were prepared to accept positions within that range."

Elaine introduced another travel and distance consideration when she spoke about a former non-resident principal who "never came back at night because it was a twenty-minute drive." She suggested that, although the actual time spent driving in rural areas and urban areas was similar, rural people, because of their "small-town mentality," as she called it, regarded distances and time differently than urban commuters did.

In summary, non-resident participants discussed travel distance and travel time in relation to the recruitment and retention of rural-school principalships and offered a number of suggestions. Although they agreed that community members would probably want them to live in the community, they expressed the opinion that living in the community should not be a requirement of employment. They suspected that if it were required, it would act as a deterrent to rural-school principalship candidates.

Some believed that future candidates would be willing to accept the significant personal cost in time and money if they could counterbalance that with a relatively short placement as part of a career path and had the opportunity to transfer closer to their home. Participants from the jurisdiction bordering a major city intimated that, although most of the rural-school principals in that jurisdiction lived in larger urban centres or a distance away from their school, they worked hard at and were able to keep their school community satisfied. However, Gordon, human resource officer of the jurisdiction that bordered a major Alberta city, suggested that his jurisdiction would not be providing travel incentives for those who chose to live away from their schools.

Providing Other Incentives

However, as Edward had stated earlier, "Based at what we're paying our administrators, we've been lucky to keep them. I think there's probably more that have stayed for other reasons."

Participants concurred that attracting and keeping rural principals required more than fair financial remuneration, benefits, and perks. In human resource officer Eleanor's words, "Although [money] is a consideration, I don't even see it as a consideration. I really don't, for the amount of work." And in Norman's words:

> I don't remember ever looking at the pay (it was nice to get some extra money—it wasn't much). So I looked at it as if I was going to grow more in my knowledge of administration, and I guess it's where the heart is. If money is a major factor, you're not going to go into administration.

According to the participants, there were other aspects of the rural-school principalship that made the position attractive to them.

As mentioned previously, participants spoke about those characteristics of the rural context that appealed to them and would likely appeal to future rural-school principals and principalship candidates, and they recommended that these characteristics either be accentuated or implemented in the future. Participants also

identified three additional appealing conditions that would likely ensure that the rural-school principalship position remained attractive in the future. They are presented under the following headings: Environment of Support, Jurisdictional Attitudes and Values, and Personally Satisfying Conditions.

Environment of Support

When Yvonne was asked what she thought would encourage people to apply for rural leadership positions, in spite of the fact that her recommendations would involve financial incentives, she said that it would be a jurisdiction's reputation for encouraging and supporting leadership aspirants that would be very important in the future:

> If it was known within the region that it was a region that encouraged and supported people in their leadership aspirations . . . in the form of release time . . . [and/or] maybe some bursary money in the form of some kind of a mentorship program between administrators, and then the region became known as valuing and accepting that point of view, I think they may have more luck in attracting that kind of talent.

Participants all agreed that the level of central office or central services support was an integral part of what it was that would make a jurisdiction appealing to principalship candidates and to existing principals. Principal Norman said, "There was support from the central office. I would probably say very good support—both professionally and personally." Fred, whose school was located about 40 minutes from the central office, contended that for him this support was a key factor:

> Another key factor is that excellent central service support is very important because you are expected to know so many things about budgeting and Special Education and all the rest of it. In order to be successful you have to be able to pick up the phone or email somebody downtown and say, "Look, this is the problem we have, and this is the information we need." So then that's critical.

Gordon, Fred's human resource officer, affirmed that if a principal needed support from somebody out of central services, they would respond in a timely

fashion. Depending on the issue and the location there "could have somebody there on site within a short period of time or through telephone or through whatever connections we have." As he observed, "I think in that sense what's really important is to give people who are in a rural setting a strong connection and a strong network within the organization." Elaine, a second-year principal, explained that the support she had received from central office had been very important, and the ability to telephone Eleanor had been very beneficial. She related one difficult situation that had occurred the previous June when there had been "two girls that were killed in a car accident," and Eleanor "was here within two hours after I phoned her." When she had called Eleanor to discuss another difficult issue, Elaine explained that Eleanor had advised her to "make your decision, and I will support you on any decision you make." Elaine said that this was "excellent support; . . . couldn't ask for better." Support from central office personnel with some of their tasks would be very important, especially when dealing with professional staff issues. Fred stated, for example, "We need good support in terms of dealing with marginal teachers." Norman cited an anecdote about a teacher being released and stated that it was very important that "there [had been] 100% support from Central Office. . . . The support of the superintendent was there."

Lawrence, also a second-year principal, pointed out that not only would it be important for rural-school principals to receive support from central office, but it was also important that the rural-school community *perceive* that the central office supported the principal and the school. He had appreciated the central office presence when someone had attended the monthly award assemblies at his school. He suggested that the community appreciated it when central office personnel were "willing to come out and be part of the school and take the time for that." Lawrence added that when he became principal he learned that the community had often turned to central office for

solutions to issues and that he had gained credibility with the community because central office supported him:

> One thing I found here in a small town, if there's a situation, they [concerned community members, parents] feel if they phone central office that something's going to be done right away. By building the trust with the community and having them see that, [central office] people are always out here, and everyone knows what's happening in this school. They tend to come here first, because they know if they phone central office, they're going to be directed back here anyway. So in that respect it's helped.

Human resource officer Edward reiterated that being supportive of rural principals would likely be very important, but central office should not be perceived as interfering with the decisions of the principal. As he said,

> We don't go knocking on their door. We try and meet with them and say it's really important for us to stay out of your face. At the same time we want to be supportive. So we need to know what you feel you need to know. . . . We're not going to tell them how to timetable. We're not a very directive organization. We expect that in site-based decision making [principals] want to be allowed to make their own decisions, and so I don't want people hovering over administrators telling them what to do and how to do it.

Yvonne agreed with Edward, her human resource officer, that part of what might make a rural principalship attractive would be the knowledge that the principal could make decisions and would be supported in those decisions:

> First of all, we need to be able to make those decisions and then we need to know that we're going to be supported in them. And I think generally in this region we are. I don't have a criticism, but I think that it's a point that really needs to be emphasized.

Participants also insisted that knowing there would be support from other agencies would likely increase the attractiveness of a rural principalship. Elaine explained that it would be very important for a rural-school principal to be able to access community resource people. As she said,

> Making contact with resource people is very important, you know. I have made very good friends with the police for questions like drugs and alcohol and, you know, what do I do when I find it? . . . So that's very important. Resource people are very important.

David mentioned that there would need to be coordination of all of the support services, including counselling, guidance, mental health, and/or speech language therapy. He expressed the opinion that "the most important thing [was] time," and "I just don't seem to have enough time in the day to get all of the work done that I need to do." Consequently, he explained that "rather than having to spend hours and hours on the phone trying to arrange things," some coordination of services would assist him with special-case students.

Participants said, as indicated earlier, that a jurisdiction that supported and encouraged career advancement would be appealing to potential candidates. For example, Edward's jurisdiction had a good record for providing career opportunities for its principals. This record would likely be appealing because of the accomplishments of jurisdictional principals that had moved on to other positions. He explained:

> Then there are the people who have moved on. We're really proud and we feel that we've got really good people. But we've only got twenty-one administrators, and four of our administrators have gone on. One's gone to work at Alberta Learning, one's gone on to be a superintendent of a Catholic jurisdiction, one's gone on to be an assistant superintendent down in [school jurisdiction] and one's gone on to be an assistant superintendent at [school jurisdiction]. So that's really good when we think that our people have gone out and competed, have shown their value to others, and have been hired on.

Some participants surmised that jurisdictional personnel's attitudes toward career-minded women would likely influence female candidate decisions to apply and, consequently, have a direct impact on the applicant pool. Principals Yvonne and Elaine suggested that a jurisdiction (the board and central office personnel) that had gained a reputation of acknowledging the talent of female teachers and had demonstrated an openness toward the recruitment of women would certainly be attractive to women. In

Yvonne's words, "I think that boards and hierarchy in school jurisdictions need to acknowledge the talent pool that they have in the female gender on their staff."

Jurisdictional Attitudes and Values

The values of jurisdictional personnel, the participants observed, would likely influence the decisions of rural-school principals and future principalship candidates. Matthew, who opined that he would not compromise on his strong values, wanted to ensure that he was comfortable in the division within which he was working so he could continue to feel that he could act on those principles. He explained that a jurisdiction's word-of-mouth reputation of being principled and willing to make the difficult decisions influenced his decision to apply for his current assignment. Prior to accepting his current position, he said that he had telephoned a friend for information, and his friend explained that the jurisdiction was very appealing because "the superintendent [was] open [and] principled, and so [were] the assistant superintendents." They would, his friend had said, "make the hard decisions even if they're not popular, and they [were] not extremely political." Edward, Matthew's human resource officer, shared with the researcher some of the values that Matthew had found appealing when he had accepted the principalship of his school:

> What we try and do as an organization, the culture that we have espoused and the values that we have espoused, is [to share with our personnel] the amount of trust, integrity, and openness [that is in the system]. And those are the values that we work on with our administrators. That is, we work on the basis of trust. There's nothing under the table. There are no black books. There's no backstabbing. There's no politics.

Similarly, participants regarded a jurisdiction in which personnel treated people with respect and dignity as appealing to both candidates for the rural principalship and existing principals. This was evident in Matthew's response to the researcher's request that he expand on what he meant when he spoke of values:

> Integrity. People acting in a principled fashion and treating people like human beings. . . . If people attempt to be principled and treat people with dignity, then usually good things happen. When people forget that the other people they are dealing with are human beings, it's much easier to make very poor decisions. I'm finding that in general that's not the case here. That's important, and that would be a major reason for my staying in a particular area. I mean I could get the best most cushy job in the world and in the most prime location, [but] if I'm having to treat people without respecting their dignity, I won't stay around. It's not worth it. They don't pay me enough money.

Participants maintained that knowing they would be trusted and treated with respect and dignity would likely increase the attractiveness of the rural principalship, encourage quality candidates to apply, and influence existing principals' decisions to stay. This was exemplified by Elaine's comment when she pointed out that her superintendent let her make her own decisions. Her superintendent had given her things to consider but had said, "You make [the decision], and I'll support you." She expressed appreciation for the "total trust" that her superintendent had placed in her.

When Gordon was asked by this researcher what he thought would encourage principals to stay in rural schools (other than financial perks), he said that the circumstances that kept people happy were "keeping them connected, recognizing the work that they are doing, keeping them involved in the organization, and generally, providing leadership opportunities for them so that they have that sense of growth." He said further that principals would require a sense of control, a sense of connectedness, opportunities for growth, support from central services, and a positive feeling about their work; and without those elements, principals would start looking around for other positions:

> They need a sense of control over their job. They need to have a sense of connectedness. They need to have opportunities for professional growth, all of those sorts of things. So if they are feeling positive about the work that they are doing, if they are recognized, if they have the opportunity to grow, if they have control over pretty much the environment, if they're rooted well within the community and within the school system, then the only desires they're going to have to move relate to their career path, and we need to talk to them

> about that. Where do they want to go and what do they do in time? And see whether we facilitate that within a planned way. So it's those—plus ensuring a good-quality staff to work with, and then support them. It's when they get, you know, unhappy and start looking in other directions that you know people want to move around all the time.

Norman reiterated the importance of feeling appreciated and recognized: "If you're doing your job in a particular place, you [would] like to be noticed, and you [would] like to be given some praise."

Personally Satisfying Conditions

Finally, participants perceived that the personal satisfaction that they received from their all-encompassing role of being a rural-school principal (a teacher, a coach, a principal, and a community leader) would likely be considered attractive to rural-school principals and future principalship candidates. Also, as indicated earlier, Lawrence spoke about the attractiveness of being a highly involved and highly influential member of the rural-school community. Yvonne and Matthew, as referred to earlier, remarked that teaching was personally satisfying to them. Discussing their workload, Edward stated that rural-school principals often gained a measure of satisfaction from coaching school teams, and that might be attractive to some principals. He said, "Even though they have [taken a team] because no one else would," when they're coaching, "the intrinsic reward then is working with those kids." To accommodate special programming for small numbers of students, Norman had chosen to give up administration time to teach, and he pointed out the personal satisfaction that he gained because he had been able to offer the alternate programs to those students. He explained that "the intrinsic reward [he had] received" had been worth the extra work for him:

> But I've got six kids in this mechanics program who attend Tuesday evenings and on Saturdays. . . . A few weeks ago we had this warm, fuzzy day for Valentine's, and one of these kids who was a potential dropout came up to me, gave me a hug, and whispered in my ear (well, yeah, this is a big guy), "You're

> the best principal." Now he doesn't want to say that out loud. But he's there from eight o'clock to five o'clock on Saturdays. No questions asked to be up so early and to stay so long to get the hours in to get what he needs. He loves it, and he thinks I've done this just for him. Well, I have partly. But I've got five other kids in there that are just as happy. That was one example. The second was, I just met somebody on the street the other day who [attended] this school and who probably never was going to get a diploma. The kid just now got a promotion in the job that he's in. He's got the courses needed to do the apprentice work. And [that wouldn't] have happened if we listened to him. He's extremely appreciative of what we did, and his comment to me was something like, "I was a [fool] in this school, but that didn't stop you encouraging me and making me do this thing, and I'm glad that you did."

Family Life and Work Life Balance

Something else that the participants felt would likely make the rural-school principalship attractive to future leadership candidates and help to retain existing principals would be their ability to create an acceptable balance between their work and family lives. They suggested, in other words, that there was a danger that a variety of time-consuming circumstances that would keep them away from their families and would make the rural-school principalship unattractive. Matthew, for example, identified the conflict for him as being a combination of driving time, time needed for administration at a small school, and time spent with his young family. He commented on the effect that the family-life/work-life conflict might have on the retention of rural-school principals:

> I guess the other problem is that I'm commuting forty-five minutes. . . . At some point in time I have to spend some time with my own family. My daughter's only twenty months old; my son is ten. I've been averaging at least twelve hours a day at this school. . . . The other thing is the commitments that these schools [principals] have to provide . . . given the financial realities and the staffing realities. It's just putting more demands on the administrators—and on the teachers. But at some point in time you have to say, "No more!" from a time standpoint. I know I won't be doing my job effectively if I'm always tired or I'm always tired when I come to work or I'm not spending time at home. Those things, I think, have to be addressed in some way, . . . because at best you're going to get people like myself who will stay here for a period of time

> and then seek other opportunities. It's not because it's not a rewarding life; it's just a matter of choice. You have to put your priorities in place, and obviously for most people family comes first.

Lawrence, who also had a lengthy commute, said that because of the time required for him to travel to and from his school daily, his wife would like him to seek a position closer to home so that he could spend more time with his family.

Because Fred had tempered the amount of time that he spent at school, he had been able to reduce the impact on his home life. He also stated that if it became necessary to spend 60 hours week at his school, he would likely resign his position:

> It ends up impacting on your home life. You hear about some of these administrators working sixty hours a week. If I . . . have to work sixty hours a week, then there is no way, no way. I would pack it up. That would be just too much of a strain. . . . So that's why I kind of temper the amount of time so that I don't overdo it. Definitely, I'm cognizant of that.

Human resource officer Edward, after reviewing the work/family life comments introduced by others, concurred that the lack of balance between family life and work life was "a major issue." He said that in reality achieving that balance for rural-school administrators would not likely be a possibility. He acknowledged that the principals and vice-principals with whom he had worked were "amazing individuals. But," he said, "forget the word *balance*."

Yvonne, also commenting on statements of other participants, related an anecdote about a principal who had been unable to balance family and work life. She confirmed that there would likely be a need for a rural principal to have supports in place to achieve an acceptable family and work life balance:

> I know that it is the reason why certain people have left administration. One lady in particular didn't even make the year out. They hired . . . a woman who had small children, and her husband was one of these workers that would go away for periods of time, so she didn't have the house support, and she didn't finish the year. She had to resign. She just couldn't cope with all the multitude of things that was happening. It was just too much for her. So I think [there]

> needs to be supports in place to be able to balance that family and work life. It really is important if you're going to keep people.

Fred and Yvonne both alluded to a potential increased difficulty in recruiting candidates for the rural principalship because of the changing age demographics and the likelihood of future principals being younger and, consequently, having younger families. Fred, for example, spoke about principals who were about 50 years old with established families, and speculated that they were better able to dedicate their energy and time to rural-school administration. He reasserted that "having a younger family makes it a little bit tougher to try and reach that balance." "That is a key issue," for candidates with a young family, and "that's what often works as a deterrent to younger people considering [administration]. They're looking at the time commitment involved and they're saying, 'Wow! There's no way! Teaching is stressful enough.'" Yvonne, noted that in her role as principal she did not have a family to worry about and had a very understanding and supportive husband. Otherwise, she suggested, "If the children factor was built into [her assignment], I don't know how long I'd be able to maintain this role."

Fred also believed that not only would it be important for rural-school principals to balance family and work life, but reaching that balance would also be crucial to a teacher trying to develop leadership skills. He intimated that a time-management course would assist a principal in developing a family-life and work-life balance. He spoke about the importance of balancing family and work life for a person he had encouraged to get into administration:

> For example, we have a lady now who's forty, who I've been providing a lot of encouragement for because I think she could be an excellent candidate. . . . She has three children, and her children are very active just like she is. She's juggling all of these things. I know she's got the ability to do it, and she's doing more time-management things. She already is an excellent time manager, but she needed just a few things to kind of fine-tune everything, because balancing family, balancing your schoolwork, and then trying to work on your potential leadership skills is a real juggling act. So yes, again, this is a crucial one for her.

Yvonne said that, although jurisdictions often pay only lip service to it, a family wellness program would help principals balance some of the conflict between family and work life.

In summary, participants hypothesized that assisting rural-school principals to be able to envision or develop a balance between work life and family life would encourage future leadership candidates to apply for rural principalships and would likely help encourage existing principals to remain in their rural-school positions.

Improving the Viability of Rural Schools

Another factor that some participants thought would likely increase the attractiveness of a rural-school principalship and thus directly influence rural-school principals and future principalship candidates would be the knowledge that rural schools would be viable alternatives to their larger urban and suburban counterparts. In other words, without the security of that knowledge, the principalship of a rural school would likely not be an attractive position. In Matthew's words, "Why would someone want to go and teach in a school if its viability is always in question?" Participant comments in this area were clustered around three themes: valuing rural schools, the viability of rural schools based on the adequacy of resources, and the viability of program offerings at rural schools.

Valuing Rural Schools

Participants stressed that for a rural-school principalship to be attractive, jurisdictions containing rural schools and the provincial government must value their rural schools.

Yvonne expressed the opinion that the Alberta Department of Learning, perhaps the board, and some of the central office administration believed that her school would likely close in the near future because of its size. Matthew and David suggested that people in rural settings were not considered when the Alberta

Department of Learning made decisions. There were, as Matthew put it, "a lot of people teaching and administering in rural areas who [felt that] they [were] the forgotten element, and that when Alberta Learning [made] decisions on education, they [didn't] take into account rural settings at all." Matthew suggested that the Alberta Department of Learning's "priority [was] based on populational or demographic . . . and economic reasoning for making decisions." In addition, "If they're suggesting that there must be schools in rural settings, then [they'd] better address those needs at some point." David said that rural-school principals would need to become more vocal about the situation in rural schools and suggested that they needed "to make more noise with the powers that be in Alberta Learning":

> And say, "Listen, there are schools out here that exist outside of the cities." . . . I think that we have to shout loud and hard on a regular basis and let them know that there are small schools out here that just can't possibly offer the things that you are trying to push down on us.

Yvonne's advice to the Alberta Department of Learning was typical of that of others when she commented that they should be "acknowledging more realistically the money that's needed to run a good program in a small school." David suggested that rural schools had unique problems and echoed Yvonne's advice. As he said,

> There needs to be a recognition that out in areas like this there needs to be a few extra dollars available. . . . I think that's one of the big things, is, the powers that be need to recognize more that small schools have some very unique problems and things that have to be dealt with.

Using different words, human resource officer Eleanor also similarly directed her comments to the Alberta Department of Learning when she stated that equity issues had not been addressed for rural schools:

> They have to really define equity. You know, what does equity mean? We all have shoes, but they should all fit. It doesn't do you any good if you have a pair of shoes that doesn't fit. You can't call that equity. And that's the way it's set up now.

In human resource officer Edward's jurisdiction, the school board and the local communities were often faced with difficult decisions related to the closing of the community schools and the implications that this would likely have for future rural-school principals. He recognized that, because the school board had chosen not to close smaller community high schools, the jurisdiction likely maintained too many schools and, consequently, were not able to take advantage of the economies of scale that larger centralized high schools might provide. He also confirmed the research by Eckstrom and Fisher (1997) in which they discovered that approximately 80% of Alberta superintendents expressed the opinion that the viability of small schools was decreasing as site-based decision making increased (p. 2). According to Edward:

> Under school-based budgeting [schools] close themselves. That's the reality. And so the way it's going right now, as one of our principals said, "We're just bleeding to death." And so the point is, do you attempt to do something radical maybe to help a little bit, or do you simply allow those schools who are just going to go down and down and down and close themselves and just let time deal with it? . . . We're involved in a jurisdiction review, and I'm not certain if there's the political stomach for it because there are communities that are quite satisfied with triple grading and maybe will be satisfied with quadruple grading. Teachers might not be. We may have to be forced to close schools because no one will take the job.

In summary, participants suggested that future principals would be attracted to rural schools if they felt that those schools would be seen as practical alternatives to larger urban and suburban schools. Participants suggested that the Alberta Department of Learning and local jurisdictions would need to value the uniqueness of rural schools and provide rural-school principals with access to adequate resources (financial, physical, and human) and the ability to offer reasonable programming for their students.

Adequate Resources

Participants felt that for a rural-school principalship to be attractive, the school must be seen to be financially viable and have adequate resources. Fred addressed the difficulties that he and other principals had experienced with the amount of financial resources provided by the Alberta Department of Learning. He spoke about typical annual staff discussions regarding class-configuration decisions because of inadequate financial resources and odd numbers in one grade. He said that in situations like that, if we had a few more dollars we could "maybe run one split class with a class of twenty-four instead of running this big class of thirty-four." He also spoke about concerns that he and his staff had regarding a difficulty with decisions related to funding the purchase of basic infrastructure items such as a photocopier and computers for a computer lab. Fred concluded that "this is out of the district's hands; it goes back to the government," and suggested that what would be needed was "adequate financial resources."

This need for adequate resources appeared to be especially true for rural schools located in smaller communities. Yvonne, whose school population was 75, talked about the difficulty with operating small-sized classes in a rural school and the resulting ramifications of the per-student funding process. When she discussed the availability of resources that might affect a candidate's decision, she described how the Alberta Department of Learning's use of the provincial average pupil/teacher ratio (PTR) of 17 to 1 to describe the status of education did not reflect the nature of the financial situation in her school. The 17 to 1 PTR "included all the consultants and everybody that [was] dealing with those children in that region." "However," she said, "they may only see them once a year, but they're still part of that ratio." She explained that bigger schools usually have 25+ children in their classrooms and that the difference in funding allows those schools with the 25+ students the financial ability to

provide other services to the students. She elaborated and described the actual financial implications for her school:

> Where it hurts us is that we have those lower pupil-teacher ratios. We have one class of seventeen, two of nineteen, and one of twenty. So it sounds wonderful, but they're split graded and tripled in the afternoon. And we only get the money for the number that are there, not for the twenty-five that the bigger schools have. So we still have to provide the same programming, the same facilities, the same materials, and so on. Exactly the same as everyone but with less money because we only get money for the number of children [we have]. . . . One of my problems is not having enough money and therefore having to compromise with staff cuts and triple grading.

Elaine, whose Catholic school was located in a larger community, revealed that there also had been discussions about closing or combining schools, including hers. She said that there would be a question of viability for any Catholic school in a small town and added, "So I could see the problem where just a [non-Catholic] school in a really small town would have a viability problem, especially if it [were] close to a bigger centre."

David spoke about his concern about student numbers and the financial difficulties of being able to offer programs in the high school portion of a multidivision school. When compared to larger schools, he felt that class size was also an issue at his school. In describing this difference, he explained the difficulties he had in maintaining high school classes of 30 students:

> It's easy enough to have a class of thirty students. You know, if I had a class of thirty students in Math 10 that's all right; I can handle that. But if you give me a class of thirty students, and twenty of them are Math 10 Pure and six are Math 10 Applied and four of them are in Math 14, I've got a group of thirty just as there might be a group of thirty in a larger school some place, except that I'm trying to teach three different classes to a group of thirty.

These class-size ramifications created by the financial realities described by Yvonne and David have created human-resource concerns for their rural schools. David, Matthew, and Yvonne, whose schools were located in rural villages, all

described difficulties with the recruitment and retention of classroom teachers. David illustrated this kind of situation when he described the variety of classes that a science teacher in his school would have to teach. Within his statement, he also alluded to the amount of student supervision for which teachers at his school were responsible. As he said, "I know that we have lost teachers because they [were] going to an area where there [were fewer] classes to prepare for—and less supervision of students."

Yvonne, as well, described similar difficulties in keeping teachers in her Grade K to 8 school when these carefully selected individuals were, after a year or two, "ready to tackle a single-graded class of thirty kids instead of a double-graded one of seventeen or eighteen" and were likely going to move to a bigger school.

As well as difficulties with finding and keeping professional staff, human resource officer Edward talked about another human resource difficulty his rural jurisdiction faced. He said that one of the challenges that rural-school principals faced was that they did not "have the ancillary services either." He added that rural-school principals were not "able to access the expertise that sometimes your urban colleagues [talked] about," and locating people who could deliver ancillary services such as occupational therapy, physical therapy, speech therapy, and behavioural specialisation would be an enormous challenge in rural areas. This situation has made it very difficult for rural-school principals, and, as he said, "It is just absolutely frustrating when a parent says to a principal, 'You provide this to my kid,' and the IPP says that he or she [was] supposed to have it," and they are unable to access these ancillary people.

In summary, participants asserted that a rural-school principalship would be more attractive if rural-school principals and future principalship candidates could count on adequate financial and human resources to operate the schools. Participants spoke about student population concerns that created difficult class-size and combined-grade decisions, their difficulties hiring and keeping professional staff, and

their difficulties accessing ancillary services for special students; all of which had an impact on the viability of rural schools.

Viable Programs

Participants suggested that for a rural-school principalship to be attractive, rural schools must be able to offer viable programs.

Principals of small rural schools, in particular, were experiencing difficulty in this area. Yvonne spoke about the difficulty that she experienced offering adequate programming because of small class sizes and multigraded classrooms. Participants seemed to take for granted the necessity for combined high school classes in rural multidivision school. Human resource officer Eleanor commented that "in our schools combined classes exist in the high school as well. It proves to be very challenging when it comes to timetabling and budget"; and a math teacher in Matthew's school taught Math 10, Math 13, and Math 14 at the same time.

Participants familiar with multidivision schools expressed considerable concern over the recently mandated change to the high school math program. Neither David nor Matthew, whose schools were in smaller communities, could envision being able to offer all of the required math programs. This was illustrated by David's suspicion that larger schools seemed to have an advantage over his situation:

> We've got a number of students who are going to take pure math. We've got a number of students who are going to take the Math 14 and 24. If I've only got two or three students who want the applied math, how am I going to offer another level of math when I have to be able to have all of the bridging courses that go along with it? You know, in theory this works very well if you've got five hundred students or a thousand students because there'll be enough students to make up a class, but I don't have that luxury.

Matthew had accepted the reality that his student population was such that he would have to combine classes to be able to offer the applied and pure math programs. He felt that combined classes were "just not feasible with the differences in the

Math 10 Pure and Applied." He explained that, because he would not be able to offer Math 10 Applied one year, consequently, he would not be able to offer a Math 10/20 Applied the following year.

In his desire to provide reasonable programming for his students, David described his jurisdiction's effort at using distance learning and video conferencing strategies to teach some of the low-enrolment courses such as Math 31 and Physics 20 which would not be viable otherwise. His jurisdiction had tried a four-school video conferencing project to teach Physics 20, which had been costly because of "the cost of long distance telephone calls and . . . the cost of the equipment that we had to rent or buy." He elaborated: "The experience we had was less than perfect mainly because of the glitches with technology." He also alluded to the difficulties that rural schools have in accessing physical resources compared to urban areas: "Out in rural Alberta like this, our telephone lines aren't very good, so we had some problems in that regard." He suggested that, to provide viable programming at his rural school, "we'll probably need to explore other avenues of offering classes in a small school" and that "the video conferencing thing I still think is a wonderful idea."

Matthew's multidivision school, which had a 70-student high school population, was located approximately 15 minutes away from a larger 230-student high school. He spoke about the difficulty that he experienced in providing reasonably competitive yet viable programming. Parents of high school students in his community faced a Catch-22 situation. In other words, if their children were to attend high school in Matthew's school, they would likely be placed in split classes because of the smaller numbers of students. On the other hand, if they were to send their students to the high school in the neighbouring community, Matthew's school would become less viable and more likely to have to offer split classes or reduced programming. Matthew observed that community members had expressed a strong desire to keep the high

school portion of the school operating, but many were sending their children to the larger neighbouring community high school to access better programming.

In summary, according to the participants, part of what would make a rural-school position attractive to principals and future principalship candidates would be their ability to offer viable programming for their students—programming that would offer those students the similar opportunities as their urban counterparts had.

Recruiting People with a Positive Disposition toward Rural Schools

To encourage rural principals to stay for a reasonable period of time and to facilitate better preparation and socialization into the rural-school principalship, some participants felt that jurisdictions should recruit teachers and administrators who already possessed a positive disposition toward rural schools. My analysis of their comments revealed that suggestions in this regard were clustered around three general areas. First, jurisdictions should consider recruiting people with an understanding of the rural-school culture. Second, jurisdictions should consider and understand that a candidate's family would likely influence his/her disposition toward the rural-school culture. Finally, some participants offered suggestions to improve the selection process to determine a candidate's disposition toward the rural-school culture.

Recruiting People with Rural Knowledge

Matthew and Lawrence, who both had urban backgrounds and commuted a considerable distance to their schools, theorized that people with urban backgrounds, like themselves, would likely experience difficulty in being a principal of a rural school. Lawrence, for example, said that a principal with urban experience would encounter a "steep learning curve" in a rural school and that, depending on an individual's personality and the amount of difference between his/her rural and urban experience, a person "could get buried." Matthew, who stated that a school like his in a small rural community was "not something a person from the city [could] understand,"

recommended that jurisdictions "look at people who come from a rural background or have an understanding of a rural-life reality from an educational standpoint." Having been born and raised in large cities, both Matthew and Lawrence agreed that, in their experience, the realities and challenges of rural schools were unique.

Yvonne also identified the importance of encouraging and recruiting people with rural backgrounds. She suggested that jurisdictions should value the leadership potential of their women teachers and encourage people "that have come from the area and who are likely to want to move back and stay in the area, because of extended family and so on, to go on for further training." In her opinion, "The people that stay in rural school settings are the ones that originally came from them":

> I think identifying people from rural areas is very important, . . . then encouraging them to stay. I think some of the [principals] in our region that are coming up for retirement have spent many years in this region. They made that commitment twenty years ago and brought their families up in the community. And that's somehow what we have to do—men and women alike.

Norman suggested that, whenever possible, a rural-school principal should come from the school staff. Yvonne speculated further that people with urban backgrounds would likely have difficulty being satisfied in rural communities. As she so aptly expressed, "I think the city folk are always looking for the city in the country, and they never really find it. And so they go to outskirts, suburbs of cities if not to the cities themselves."

Matthew's comment about the rural community confirmed Yvonne's perception of "city folk" as well as her recommendation that jurisdictions will likely need to look to the rural teaching ranks for potential candidates:

> I have no rural background. I have no rural predisposition. You are not going to see me living in a rural community. And it's not a judgement on that setting; it's just a personal preference—just like I don't drink milk. It's not because there's anything wrong with it. I just don't like milk, and if I had my druthers, and I plan to have that, at some point in time I'm going to be in a larger setting.

> . . . I think recruitment has to focus perhaps in the areas where rural school settings exist. . . . These divisions have to look specifically at teaching ranks and people, teachers that teach in rural settings.

Elaine agreed with Matthew and commented that "if you are a teacher in a rural area, you obviously want to be there, you know, so therefore I think they have to recruit from rural—rural people." However, as human resource officer Edward said, "Predisposition is an individual thing," and he added that he did not know how a jurisdiction would measure that.

Yvonne also stated that jurisdictions should even consider identifying and recruiting future school leaders from the ranks of local high schools. She suggested that Grade 12 leaders (those, for example, who were on the graduate committees, the yearbook committee, school teams, and/or students' union) should be encouraged with scholarships to go into the teaching profession. As she proposed, "Let them get their training, let them get some teaching experience, encourage them to come back to teach in the area where their roots are, and then encourage them to go on to further administrative training." After reading Yvonne's comment, Fred observed that her suggestion certainly had merit. He elaborated:

> I can see that now as I look at other people that I live with. Even in our community, you take a look at the people that have the initiative. If you look at the people that showed the initiative in high school and were involved either with student's council and sports teams or whatever, . . . twenty-five years later they're still involved. . . . So you can definitely identify that leadership trait right back to high school.

In summary, because teachers with a rural background are more familiar with rural schools than are those with an urban background and therefore would be more likely to have a positive disposition toward rural schools, participant comments indicated that jurisdictions should consider recruiting people who have rural roots.

Family Considerations

Some participants also stressed that a candidate's family would likely influence future rural-school principalship candidates' disposition toward the rural-school culture. They commented about three familial influences: spousal influence, influence of children, and influence of the extended family.

A few participants commented upon and related anecdotes about spousal satisfaction with experiences in rural areas, spousal satisfaction with employment opportunities, spousal support, and opportunities for seeking a spouse. Matthew, who was born and raised in urban areas, suggested that part of what influenced him to seek a rural-school principalship was that his wife, who came from a farming background, had said that "she might want to live in a rural area [on] an acreage." Yvonne related an anecdote about a former principal in her region who did not stay because "his wife was very unhappy here." Norman also related an anecdote about an experience in another community in which he and his wife, who had a French background, were chastised by community members for speaking another language to their children. Because his wife was not very comfortable in the town, "we decided that we weren't going back there. Not because of the school; the school was very nice. It was actually fun working there. But no, we decided to change and came here." Participant comments suggested that spousal familiarity with and experiences within the rural culture would likely affect the recruitment and retention of rural-school principals.

Matthew also pointed out that the lack of employment opportunities for his wife influenced his decision to leave a previous administrative position. Although the previous jurisdiction provided meaningful professional development (including a trip for him to a NASSP conference in New Orleans) and had more computers than Calgary

Public School District, he explained that because there was no viable employment for his wife, he chose to leave that jurisdiction and accept a position in his current school.

A few participants suggested that spousal support for the pursuance of administrative positions would influence a candidate's disposition toward rural schools. In a previously referred to comment, Yvonne's husband's support and understanding influenced her decision to remain at her school. David, who had been offered the principalship at his school on several occasions, had chosen to accept the position after his wife encouraged him to take the principalship. Eleanor explained that when she had been offered the opportunity for the superintendency, her husband influenced her decision with his expression of support. She stated that when she " was torn" and "didn't know what to do because [she] wanted to be at home," he had said to her, "Hey, this is what you've worked for, and they're handing it to you. Why would you even consider not taking it?"

Eleanor pointed out another factor that would likely influence a candidate's disposition toward the rural-school culture. She suggested that young, unmarried candidates might be inclined to leave a rural school because they would not want to remain single. "Oftentimes there's just no males or females that are suitable for them in smaller regions" and suggested in a somewhat tongue-in-cheek manner that rural jurisdictions might need to hone their matchmaking skills.

Most participant comments implied that the well-being and happiness of a candidate's children would likely influence his or her disposition toward a rural-school principalship. There were a number of previously referred to comments pertaining to participants' feelings that rural communities were attractive because they were a good place to raise a family. Norman's comment about choosing his current school was typical. He said that "it was a relatively small town so, you know, probably a good place to bring up kids." Norman also suggested, "Our kids kind of found their niche, and things were going to go fine"; and because they "were telling us they enjoyed it and

they have good friends," he declined an offer of a principalship in another location. The happiness of his children, he suggested, was "very important for the family too."

Some participant comments felt that a candidate's extended family's attitude and location would likely influence his or her disposition toward a rural-school principalship. David suggested that "family is important to most people," and he spoke about the importance of his own family. After four years of teaching, for example, he was offered the vice-principalship at his school, and after consultation with his parents and his wife, he accepted the position. When asked why he chose to remain as principal of his rural school, he explained that even though he knew that he could get positions in other communities, his family kept him here: "How do we keep people here? As I said, I've got family here. I've found a community I like. I grew up here, and I like it." Fred speculated about the possibility of a rural-school principal being transferred to another community. He pointed out that the move would be a major sacrifice if the principal's family was already established and his/her grandparents and all of his/her family support were in the area as well.

In summary, participant comments averred that the disposition of a candidate's spouse, children, and extended family would likely influence decisions of potential rural-school principalship candidates.

Selection Process

Participant comments contained three suggestions for use during a rural-school principalship selection process. First, a few participants suggested that during the interview process it would likely be important for jurisdictions to determine the candidate's familiarity with the rural-school and community culture. For example, Matthew, who has an urban background, suggested that it would be important in the future to determine whether or not a candidate for a rural-school principalship has a rural background. He went on to suggest, as well, that the jurisdictional interview

committee should ask each candidate questions that were "unique to a rural setting" and, consequently, would "highlight [their] thinking process in relation to long-term decisions." He felt that "that would suggest how a person [was] thinking about decisions" that related to rural schools. He expressed the opinion that it would be important to ask direct questions that related to a candidate's experience or lack of experience with rural setting. Human resource officer Gordon stated that, although his interview committee did not ask questions specifically about a candidate's knowledge of rural areas, they did look into a candidates' backgrounds and generally asked them questions about how they would go about getting to know the community. As he said, "We may ask them questions about [their] understanding of the uniqueness, the character of the community and if they don't, how would they go about assessing that?"

Second, a few participants believed that during the interview it may be important for rural jurisdictions to determine a candidate's intended length of stay. When asked, "What might help future principals remain within rural schools and/or rural jurisdictions for a reasonable period of time?" participants stated that what constituted a reasonable period of time tended to be between three and five years. Gordon commented that he'd "been around talking to all of the principals regarding their career plans." He said they seemed to think that around

> five years [was] when they would begin to start considering changes, and they [would] need about that much time to work through the things that they [wanted] to do, so it would probably tend to be closer to the five.

Fred suggested that "in terms of making a difference for the school, they [principals] should be there for three years." Matthew spoke about his reluctance to implement some of the changes that he thought would need to take place because he did not think that it would be fair to the community or the school staff if he were to make drastic changes and then leave in a year or two. Lawrence, who was contemplating a move

because of the driving distance, observed that the community would like him to stay. He said, "They always tell me that I'm here forever." Finally, Edward revealed that the interview committee in his jurisdiction asked candidates about their intended length of stay. He suggested that although he had "no problem with someone who [had] career goals and [wanted] to use something as a stepping stone," depending on the circumstances, he might be reluctant to provide a positive reference for someone who did not put in the amount of time that they had promised. Participants' comments confirmed that it would likely be a good idea to determine a candidate's intended length of stay in a rural-school principalship.

Third, some participants suggested that to determine a candidate's disposition toward the rural-principalship, it would likely be important for rural jurisdictions to include local community members and trustees on the selection committee. Both Edward and Eleanor noted that local trustees and community members were influential in the selection of a rural-school principal. Gordon affirmed that, when they were looking at the leadership qualities that individuals have and determining whether or not there would be a potential match, "in the recruitment process [we] involve the local trustee and parents. It's part of that process."

Summary

When participants were asked to speculate about what might encourage qualified applicants to apply for rural principalships, their responses were similar to those that they provided to questions related to retention. Generally speaking and simply put, in order to recruit *and* retain rural-school principals, participants were of the opinion that future rural-school principals and principalship candidates would have to consider the position an attractive one. Consequently, within this chapter, the findings related to recruitment and retention were organized and presented as suggestions for enhancing the attractiveness of the rural-school principalship. First,

participants spoke about the importance of emphasizing and celebrating the appealing aspects of the rural-school context. Second, they spoke about finance-related incentives intended to counterbalance some of the unattractive aspects of a rural-school principalship. They spoke about administrative allowance, administrative time, professional development, travel considerations, and other rural compensation considerations. Third, participants mentioned some of the other characteristics of the rural-school position that would have an impact on the attractiveness of the rural-school position. Fourth, participants spoke about the importance of future rural-school principals knowing that their schools would be viable alternatives to the larger urban and suburban schools, and they talked about ways that might ensure that they would be. Finally, participants spoke about recruiting teachers and administrators who already had a positive disposition toward rural schools.

CHAPTER 6

Findings Related to Socialization

Introduction

Within the previous chapter, my analysis of participant comments revealed that they held the opinion that a jurisdiction's ability to recruit and retain rural-school principals would likely be directly related to its capacity to make the rural principalship an attractive position for future candidates. Their comments also emphasized that people with a positive disposition toward rural schools would likely be more willing to accept and stay in a rural-school principalship position. Consequently, procedures to increase the number of candidates for the rural-school principalship and keep them in their rural schools for a reasonable period of time were presented. However, as mentioned earlier, Eckstrom and Fischer (1997) discovered that rural superintendents were dissatisfied not only with the number of principalship candidates, but also with the *quality* of that candidate pool. As a result, to understand what might be required to improve the quality of this candidate pool and prepare future rural-school principals for their positions, I asked participants (a) to reflect and comment upon the manner in which *they* became familiar with the nature of the roles and responsibilities of a rural-school principal, (b) to speculate and comment about what might be required to help future neophyte rural-school principals understand the nature of the position, and (c) to theorize and comment about what might be required to ensure that future rural-school principals adequately learn about and cope with educational changes. My analysis of their responses to these questions revealed that all participants concurred that it would be important for jurisdictions to actively socialize their future rural-school principals. In other words, jurisdictions would have to ensure

that their future rural-school principals acquire and maintain the knowledge, skills, and dispositions needed to perform their role adequately (Leithwood et al., 1992, p. 148).

All participants expressed the opinion that, to ensure that Alberta's rural schools continue to have leaders who adequately perform their role, future rural-school principals would likely require considerable professional development and training. Their comments showed that this socialization and training would need to occur both prior to and following the principal's appointment to the rural-school principalship. An analysis of their comments also revealed that this socialization and training would be most effective if it occurred within a learning community. In this chapter I present the socialization and training processes proposed by participants and the learning conditions that participants perceived would enhance the future rural-school principal's socialization and training.

Socialization and Preparation Processes

According to the literature there are two types of socialization: professional and organizational. Professional socialization, as described in the literature review, is the personal process of beginning to learn what it means to be a school principal, which occurs prior to being appointed or selected and usually ends when these principals no longer feel like rookies—generally, at the end of the first year of their assignment (Hart, 1993). Organizational socialization teaches the principal the knowledge, values, and behaviours required in a particular role within a particular jurisdiction or a particular school (Hart, 1993). Hart and Weindling (1996) labelled the three stages of organizational socialization as encounter and confrontation, accommodation and integration (a gradual fitting in), and stabilization (educational leadership and professional actualization; pp. 326-328). However, because I have chosen to examine the recruitment, retention, *and* socialization of Alberta's rural-school principals and have pointed out that these three are not isolated processes but

actually intricately interrelated, I have chosen to present my analysis of participant comments about the professional and organizational socialization continuum in a manner that more accurately reflects the responses as they were presented during the interviews. As a result, I report participant-proposed socializing growth procedures that would likely be required to occur prior to (preservice) and following (inservice) a future rural-school principal's appointment to his or her position and address issues related to their access to those procedures.

Preservice

Participants spoke about two general preservice socialization procedures that would likely ensure that rural-school principalship candidates would be qualified and simultaneously increase the quantity of candidates. They spoke about informal and formal practices or strategies that would assist those teachers with leadership skills to develop and enhance their potential.

Informal Leadership-Developing Strategies

According to some participants, those people who were teaching in rural schools—those who actually wanted to be there—and those teachers with a rural-school background would likely already be somewhat presocialized toward a rural-school principalship. Norman's comment paralleled those in the literature about professional socialization: "So much of what you learn for administration is from your teaching career." Elaine stated that a teacher would "need a fair amount of years of experience." She hypothesized, "I think you need at least five years of experience in the teaching field before you should start thinking about administration." She surmised that a person with five years' experience might have "become exposed to the problems that are around" and, consequently, paraphrasing Hart (1993), would have begun to internalize the norms, values, and behaviours generally accepted as being a part of an administrator's professional role.

All participants indicated the significance of preservice socialization as a recruitment strategy and indicated that this socialization often occurred informally and unbeknownst to the potential principalship candidate. This covert socialization would manifest itself when, for example, a principal recognized the accomplishments of, sought the advice of, or assigned administrator-like responsibilities to teachers who demonstrated leadership qualities. To prepare future rural-school principals, participants felt that preservice socialization strategies would likely need to be enacted in an overt manner. Principal Elaine opined, "I'm saying that they [principals] need to look around on the staff and see which people might have good leadership skills and encourage them." Human resource officer Gordon agreed with Elaine, but he believed that current principals would play the key role by overtly encouraging teachers with leadership skills. In Gordon's words, "I believe our current principals need to identify and to recognize staff members who have potential to become administrators." Principal Yvonne proposed that, to increase the number of rural-school principalship candidates, superintendents should formally request principals to identify those teachers who have the potential to become principals. She said, "There is a shortage coming, and we have to decide what we're going to do . . . to recognize them early and then to put things in place to encourage them to stay in rural areas." Yvonne indicated that there was an untapped pool of women with potential leadership skills on rural teaching staffs and suggested that when jurisdictions contemplate preservice socialization strategies, it may be important for them to consider that women may not have "been encouraged and affirmed in the same way" as men. She felt that assertively affirming and encouraging women with leadership skills would augment the rural-school principalship candidate pool. Edward, human resource officer of Spartan School Jurisdiction, concurred with Gordon and indicated that in his jurisdiction they "rely heavily on our principals to identify prospective leaders," but they had not yet formalized the identification process. It has been, he explained, a quandary for his

jurisdiction because "[our] focus has been on so many other things that we haven't really spent the time with our administrators to ask what should [be done] to identify prospective leaders." As a result, prospective leadership candidates were often "self-selected." In summary, to ensure sufficient qualified candidates for future rural-school principalship positions, participants said that the identification and socialization of rural teachers with leadership potential would likely have to become a formalized process for rural-school jurisdictions.

All participants also suggested that preservice socialization would likely need to become part of a deliberately structured strategy. In order to enhance the development of the knowledge, values, and behaviours of these recognized leadership nominees, Gordon said, for example, that jurisdictions and principals "need to identify and to recognize staff members who have potential to become administrators." To begin to learn aspects of the rural-school principalship role and, in Gordon's words, "support individuals in deciding whether they want to choose administration," a number of purposively structured procedures were recommended. All participants expressed the opinion that principals would need to provide overt encouragement and opportunities for potential leadership candidates' attendance at leadership conferences, workshops, and courses. Those mentioned were the Western Canadian Education Administrators' Conference, the Banff Leadership Seminar, Blueprints, jurisdictional leadership, and university courses. Some participants maintained that principals would also need to provide overt encouragement for and support of a potential candidate's involvement in various regional, provincial, national, and international committees or organizations, such as ATA committees, the Alberta Department of Learning steering committees, and the Association for Supervision and Curriculum Development. Most participants suggested as well that existing principals would need to provide potential candidates with opportunities to assume leadership roles within the school, such as being assigned as principal designates and committee chairs, presiding over staff

meetings, and being involved with community or school activities. Elaine, for example, had gained experience as part of her school's three-member management team. Some participants further recommended that rural-school principals would likely need to mentor potential candidates and perhaps provide job-shadow opportunities for them. Finally, a number of participants proposed that the experiential and mentored knowledge gained from being an assistant/vice principal in a rural school setting would facilitate the preparation of and likely be the ideal method for preservice socializing of future rural-school principals. Principal Lawrence, whose previous experience was in urban schools, speculated that without prior experience as a rural-school assistant/vice principal, an urbanite could possibly be overwhelmed in a rural-school principalship. All of these informal yet deliberately structured, preservice, preparatory, and socializing procedures would serve to increase both the number of rural-school principalship candidates and at the same time, by introducing them to that role, improve the quality of those candidates.

Formal Leadership Strategies

In addition to the above-mentioned principal-driven socializing procedures, most participants proposed that some type of formal preservice leadership training would likely be an important preparatory and socializing process for future rural-school principals. Three types of formal preservice leadership training courses were noted: those offered by the universities, those offered through the jurisdiction, and those offered through other agencies.

University-offered courses. All participants commented on the significance of university-offered principal-preparation courses. Principal David, for example, said that "a principal preparation course" should be offered as part of a university's Bachelor of Education program. He proposed that the course might include components such as budgeting, interpersonal relationships, staff selection, and hiring.

He thought that it would likely be important to help potential principal aspirants "know some of the kinds of things that they are going to be into and give them some preparation and advanced training." Although some felt that, because of their own experience, postgraduate courses may not need to be an essential requirement for attaining the position, most participants generally recommended that some form of university-offered postgraduate course work would likely be an important component of the preservice preparation and socialization of future principals. Practical course content was presented as being important for future rural-school principals, and the following specific topics were identified: budgeting, timetabling, interpersonal skills, time management, teacher evaluation, education law, and special-education management.

Jurisdiction-offered courses. Some participants also spoke about jurisdiction-sponsored leadership preparatory programs having the potential to contribute to the preservice socialization of future rural-school principalship candidates. Gordon, human resource officer of the largest jurisdiction in the study, described the preservice program that had been developed in his jurisdiction as part of the succession planning process:

> One of them is the [preservice leadership development] program. That one is an accredited university program. It's about eighty hours of actual session time, assignments, and other things that are required beyond that. So any teacher in our school jurisdiction can enrol in that program. Right now it's running on a continuous basis. In the past it was offered every second year, but now we have it set up as modules, and we're running it continuously, so it has multiple entry points. People can come in at any particular module, but to complete the program they have to run the full cycle. It covers all of the areas of administration that they will probably be involved in: governance, human resources, finance, student transportation, and instructional leadership. It's actually built around our quality practice standards that we have for in-school administrators. Those standards are divided into four areas—visionary leadership, instructional leadership, organization management, and ethics.

The two human resource officers of the more rural jurisdictions in the study expressed frustration with the notion of jurisdiction-delivered preservice programs. Eleanor observed that, because of the size of her jurisdiction, it would be "difficult for us to even think of holding a leadership program, and yet we need to make it available to our aspiring teachers." Edward asserted that because "the bottom line [was] that you've got to have good people in the classroom," he had difficulty with "sixty-some-odd jurisdictions in this province reinventing the wheel" and all desiring the acculturation of their future principals into their "right way of doing things." He proposed that, rather than having these "sixty-one organizations spinning their wheels and doing it themselves," a province-wide coalition of organizations develop and deliver a preservice principal preparation and socialization program. As Edward said,

> The reality in my mind is that CASS, the College of Alberta Superintendents, and the ATA [Alberta Teachers' Association] (or call it the Council on School Administration [CSA] within the ATA) are simply missing the boat in the sense of not coming together and putting on a province-wide program. It could be in six different zones based on the consortia, and it could be in two different sections of the province. But I think either the universities or CASS or some group has got to try and marshal the resources to put something on.

Or, as Eleanor stated, referring to principal preparation programs offered by large urban jurisdictions, "If the big cities are preparing their future administrators, . . . it's going to leave us out in the dark." Then perhaps rural jurisdictions will "need to partner somehow with some of these bigger boards" to prepare their future rural-school principals.

Other agency-offered courses. Finally, other organizations that would likely contribute to the preservice socialization and leadership training of future rural-school principals were also identified. Principal Norman and human resource officer Edward indicated the value of the CSA-sponsored Educational Leadership Academy. Principal Matthew spoke about the CASS-sponsored beginning principals' conference that he

had attended the previous summer. He said that although "it was very helpful and instructive in a general way," he would have preferred assistance on some very specific topics (how to budget and timetable, for example).

In summary, participants generally agreed that formal and informal preservice, and preparatory and socializing tactics would contribute to a jurisdiction's success in recruiting a satisfactory quantity of qualified rural-school principalship candidates and simultaneously enhance the knowledge, skills, and dispositions needed by these future rural-school principals to adequately perform their duties.

Inservice

As indicated earlier, participants were asked two questions related to inservice postappointment socialization. This section presents participants' speculations about ways to ensure that future beginning principals acquire the knowledge, skills, and dispositions to satisfactorily perform their rural-school principalship duties. Also presented are participants' suppositions about requirements to ensure that future rural-school principals maintain these necessary skills and dispositions and develop new understanding as the education milieu changes.

The analysis of participant comments revealed that each jurisdiction utilized different processes for hiring principals. Participants from Gala School Jurisdiction said that their jurisdiction advertised and hired principals from an internal candidate pool comprised of aspirants who had completed their preservice leadership development program. Participants from Empress and Spartan School Jurisdictions explained that their jurisdictions both advertised for and filled principalship positions with either external or internal candidates. As a result, participants' comments about tactics that might be utilized to ensure that future beginning principals understand the nature of their rural-school role represented proposals from a variety of experiences. Analysis of participant comments is presented under the headings Jurisdiction-Offered

Orientation and Support, Mentorship Opportunities, and Professional Growth Opportunities. Participants' remarks about the inservice socialization of *new* rural-school principals are reported under all three of these headings. However, comments specific to the maintenance and further development of rural-school principal leadership skills are presented under the third heading.

Jurisdiction-Offered Orientation and Support

All participants speculated that beginning principals would likely acquire some of the required knowledge, skills, and dispositions to satisfactorily perform their rural-school principalship duties through orientation programs offered by the jurisdiction. For example, Edward, human resource officer of Spartan School Jurisdiction, mentioned that although his jurisdiction did not usually have a formal, well-articulated orientation plan for new principals and the previous year was the first time they had had more than one new principal, they provided a partial-day orientation for the three new principals, "going over those thing that we felt were relevant." He recommended, as did Eleanor, human resource officer of Empress School Jurisdiction, that even though it wasn't likely that their jurisdictions would be appointing many new principals in the future, having a formal well-articulated orientation program would be advisable. Gordon, human resource officer of the jurisdiction that sponsored the preservice administrative development program, observed that they "[hadn't] developed formal orientation programs" for new principals, but he added, "There's an opportunity for them to meet prior administrators and the executive team to talk about expectations for the community."

Matthew, a first-time principal who was new to the jurisdiction and a high school-experienced person with urban roots, attended the CASS-sponsored leadership academy in the summer and a jurisdiction orientation to prepare for his new assignment. However, he claimed that, although the academy, the orientation, and

readily available central office support were all helpful, he was not prepared for the nature of his multidivision rural-school assignment:

> There are things that occur that I would not have even thought of considering. I guess you learn as you go, but it would be nice to have some preparation on hand before you begin. I kind of liken what's happened to me this year to the surf going out. It's very much like I'm at a beach and I've gone out to swim and the surf has hit me, and just as I've caught my balance to get up again, another wave comes in and knocks me down again. It's a matter of trying to get my balance each time the wave is coming. But that's very much what I feel. Just when I've got my balance, bang, another wave hits and I'm trying to catch up, as opposed to being proactive way in advance. And I think some of it has to do with honestly that maybe I could have been better prepared in some ways; but some of it was, there was no way I could expect some of the things that have occurred. I mean, I don't have the experience base, not just professionally, but on a life level. You know, I'm not from a rural background, [and] there are things that I just could not understand, because I have no experience.

As exemplified by Matthew's comment, participants recommended that it would probably be an ideal strategy for jurisdictions to consider recruiting and training principalship candidates with an understanding of the nature of rural schools. There were, as Edward identified, potential advantages of hiring someone from within the jurisdiction:

> We would expect some of our people to be aware of the process in the school—aware of some of our policies. How do you deal with social workers when they come in and they want to see a student? How do you deal with the police? How do you handle discipline in our school? So we would expect [that] a person who has some internal understanding of [our] way of doing things would have an edge over somebody [who hasn't]—all things being equal.

However, Yvonne, who was hired externally, had previous principal experience, and was familiar with the rural setting, and Matthew both believed that it would be important for jurisdiction personnel to formally familiarize principals new to a jurisdiction with the jurisdiction policy and administrative handbooks. According to Yvonne:

> I would think [that there would be some advantage to having] some time spent with them in central office, going through the policy and administration handbook. We do have an administration handbook. It's this thick, you know, and there's no way that I can know everything that's in it, but I use it like a Bible. But it would be useful to go through and just have an outline of what's in it, and somebody to discuss things with. It's all very well to look at something by yourself. So I would say a two- or three-day preparation period where the administration handbook and the policy handbook were looked at [would be very helpful].

In summary, as was indicated in the literature review by Murphy (1998) and Thomas, (1997), participants in general agreed that an orientation program offered by the jurisdiction would be important to clarify and communicate the roles, responsibilities and effective behaviours of the principal's position within the district and the school.

Mentorship Opportunities

Most participants suggested that future rural-school principals, whether new to the jurisdiction or the rural-school position, would likely benefit from formal and informal mentorship opportunities. It had been very important for Elaine, a second-year principal with no experience as a vice-principal, to have "a good role model." Matthew, a first-year principal, commented that "a close friend who [had] been a principal here for awhile" had informally mentored him. Because of the unique nature of a rural school, he felt that the mentorship process would likely need to be formalized for rural-school principals. Yvonne expressed the view, based on her own experience, that having a formally appointed mentor for each new principal would be a good idea:

> When I came, I didn't really know anybody as far as colleagues and so on, maybe a few people from [the neighbouring community], and that was about it. But if the human resources superintendent had put me in touch with somebody, maybe another woman, we [would have had] things in common to [talk about], somebody I could call. I did feel very isolated in those first two years, I would say, until other people came to know me.

Principal Fred affirmed that "mentoring time with experienced principals would probably be beneficial," but, because of potential personality or leadership-style conflicts, he was not sure that each new principal should have a formally assigned mentor. However, his own leadership style had been shaped by his experience with aspects of other principals' leadership styles that were not congruent with his own beliefs.

Both David and Edward said that a formal mentorship program for administrators, similar to the ATA beginning-teacher mentorship program, might be established to assist new rural-school principals. David recommended:

> So why couldn't we have a mentorship program for administrators as well? If I'm a brand-new principal and I'm in a school which has K-12 and a hundred and fifty or a hundred and eighty students, maybe there would be another principal who has more experience than I in a similar school who would be able to share some ideas, concerns, and thoughts—to help with procedures and protocol and things like that. . . . So establish a formal mentorship program for administrators too. We do it kind of informally right now, but maybe something formal where there are dollars available for it.

In summary, in general, participants emphasized that opportunities to have experienced rural-school principals assigned as their mentors would help future neophyte rural-school principals understand the nature of the position.

Professional Growth Opportunities

All participants agreed that access to both research-based and practical, rural-school-specific professional development opportunities would be essential for the success of future beginning *and* experienced rural-school principals. Participant comments were categorized into university-offered, jurisdiction-offered, and third-party-offered professional growth opportunities.

University-offered professional growth opportunities. All participants spoke about the potential contribution of university-offered postgraduate courses to

the socialization of rural-school principals. In fact, most expressed a somewhat unconditional understanding and general acceptance of the value and importance of pursuing either a master's or a doctoral degree. For example, when asked whether universities would play a key role in preparing rural-school administrators, Eleanor replied that she "could see them playing a key role in everything." David, who had not pursued a postgraduate degree, expressed regret that he had not and predicted that, regardless of a rural-school principal's postgraduate training in the future, it would be "vital that an administrator, especially in rural-area trends, keep up to date on current developments in research and things like that."

Two participants, though, expressed the opinion that the pursuit of a master's degree might be more beneficial while being immersed in an administrative position. Principal Norman said, "My best advice is get in there, get immersed, then take the courses," because, he surmised, many of the university courses would not have prepared him for the situations that he personally had encountered. Because it worked well for him, Fred agreed with Norman and expressed the opinion that potential principalship candidates might be reluctant to invest in a postgraduate program unless they were sure that they would be interested in administration and perceive benefits from the postgraduate courses:

> It may be useful to take formal leadership training after being immersed in the principalship. I mean, that worked well for me. I had a chance to experience the principalship at a small level. And then I thought, yes, I was really interested. And then I said, "Okay, I'm willing to make the commitment and then go on to postgraduate studies"; whereas some people are reluctant and say, "I don't want to spend time taking university courses. [I would like to] try the principalship and find out if I'm really interested in it," because unless they take the initiative and . . . make that commitment in terms of time, unless they finish their fifth year, they're not going to get any extra money out of it.

Because of the potential shortage of administrators in rural areas, Yvonne added that "we may have to just say to some of these young men or women that show promise,

'Try the principalship and if you think that it's for you. Then we'll help you with your other training.'"

All participants offered recommendations about the content and method of delivery of these university-offered postgraduate administration courses. They recommended courses that they considered practical, such as site-based decision-making processes, conflict-resolution tactics, statistical analysis, school-related law issues, and finance-management strategies; but they also recognized the importance of research-based, quasi-theoretical courses such as change theory and leadership theory. Participants generally showed a preference for courses that allowed them to expand their learning through interaction with other practicing administrators. Norman observed that his most useful course included case-study analyses and collegial discussions about actual school issues with a former superintendent. Fred extolled the virtues of the experiential learning and the related collegial discourse involved in a University of Alberta elementary principalship simulation course:

> It puts you into this office with the same scenario that you're dealing with today—phones, email, memos. It helps teach you time management. It helps give you experience in dealing with parents on the phone. And we had a chance to sit back down and talk in small groups and find out how other people, for example, handled the phone calls. And then we looked at what some of the best practices were and some things that wouldn't be viewed as very effective. So I thought that was an excellent course.

Jurisdiction-offered professional growth opportunities. Analysis of participant comments revealed a perception that jurisdiction-offered or jurisdiction-initiated professional growth opportunities would play an important role in the development and maintenance of the skills and dispositions required for future rural-school principals.

A number of recommendations about the content and method of delivery of these jurisdiction-delivered inservice opportunities were offered. Inservice

opportunities that would be practical as well as address the changing nature of the education milieu in Alberta were re-emphasized. Topics such as budgeting procedures, teacher-evaluation techniques, timetabling techniques, special-education procedures, declining-enrolment issues, interviewing techniques, and curricular-change issues were proposed. All participants recommended that jurisdictional personnel facilitate these professional growth opportunities either by delivering them with in-house personnel or by brokering the delivery to another group or agency, and all expressed a strong proclivity toward opportunities to network and interact with practicing administrators in similar situations.

Gordon, human resource officer of the largest jurisdiction in the study, commented that, although there was no program specific for rural-school administrators, his jurisdiction provided a number of formal opportunities for practicing administrators to strengthen their current skills. The program was an inservice skill sustaining program. As he described it,

> It's like a financial portfolio in that you may have a variety of different investments in a financial portfolio. So our leadership investment portfolio has a variety of programs within it that support leadership. [It's] a collection of a number of things [that] probably [include] twenty to twenty-five or so different opportunities that administrators have to choose from.

As well, as part of a formal succession planning process, his jurisdiction would be providing an additional shorter "leadership investment" for practicing administrators interested in a transition "from a small school to a large school, from a school to central services," or from an assistant principalship to a principalship. However, both human resource officers of the smaller jurisdictions in the study indicated that, because it was difficult for them to prepare and deliver formal skill-strengthening programs, it would likely be more feasible for them to turn to other agencies for the provision of these formal programs.

Other professional-growth opportunities. All participants spoke about other opportunities for future rural-school principals to acquire and maintain some of the required knowledge, skills, and dispositions to satisfactorily perform their duties. For example, in addition to advocating reading professional journals, Norman stated that "the Internet is a good resource, . . . especially when the site has connected sites." Yvonne said, "The thing that helped me more than anything else in those early days was being part of the administrator's site-based budget committee." Matthew, principal of a small K-12 school, reported that because there will be a need for "professional development in relation to the unique opportunities and challenges of a rural setting," there would likely need to be "an association of rural-school administrators that through networking and brainstorming [could] come up with better ways to facilitate learning." Future principals, David advocated, "should take advantage of every kind of workshop" that would likely help them with their jobs. Because much of a principal's role requires conflict-management skills, Edward surmised that "maybe all administrators need to have a certificate from the Alberta Arbitration and Mediation Society." The following workshop and conference delivery organizations were mentioned: the National Association of Secondary School Principals, the Alberta Teachers' Association's Council of School Administration, Alberta Catholic School Trustees Association, and the Alberta Department of Learning Consortia.

In summary, university-offered, jurisdiction-offered, and third-party-offered professional growth opportunities were suggested as being essential for the success of future rural-school principals. A preference was expressed for the acquisition of practical knowledge, skills, and dispositions garnered in a collegial interactive atmosphere. In addition to the socializing nature of these growth opportunities, most participants contended that support for and access to these opportunities would have an impact on a principal's desire to stay with the school and the jurisdiction.

Access Considerations

As indicated in the preceding sections, all participants consistently agreed that some form of professional growth process would likely be an integral ingredient in the preservice and inservice socialization of future rural-school principals. However, to take advantage of these opportunities, the participants identified three general access considerations that would likely need to be contemplated in the future. First, jurisdictions would likely have to continue to provide some form of financial assistance for the preservice and inservice socialization of future rural-school principals. Second, universities, jurisdictions, and third-party PD providers would likely need to consider the quasi-isolated nature of rural schools. Finally, universities, jurisdictions, and third-party PD providers would likely need to take into consideration the nature of future rural-school principals' families.

Financial Assistance

All participants spoke about the importance of providing some form of financial assistance to facilitate a future rural-school principal's ability to access professional growth opportunities, and they discussed both direct and indirect methods of providing this monetary assistance.

As illustrated by the following examples, participants advocated facilitating access to these growth opportunities through some form of direct subsidy to individuals. David and Yvonne mentioned the importance of support for further university education through financially assisted sabbatical leaves; or, as Lawrence said, support to "offset the cost of grad studies." Edward, human resource officer of an all-rural-school jurisdiction, referred to providing full support for two principals who, at his direction, attended the previously-mentioned conflict resolution course to determine its relevance for principals in his jurisdiction. Matthew spoke about the importance of having the financially assisted ability to access "meaningful professional

development, [and] not having to cut corners to do it." Norman stressed the importance of maintaining PD funds in the school budget that teacher-leadership aspirants could access. Eleanor, human resource officer of the smallest jurisdiction in the study, talked about the importance of maintaining a pool of dollars to assist principals to attend conferences and workshops, or the "zone principalship meetings," by providing support for mileage and other expenses. But, as both Eleanor and Norman advised, because of potential teaching staff misconceptions, it would be important to keep this kind of administrative PD fund located in a central pool.

In addition to providing funds directly to them, some participants indicated other ways of providing financial assistance to facilitate their attendance at professional growth experiences. Fred, for example, who had completed his master's degree after becoming principal and who was involved in cohort-group meetings during school hours, stated that because he was given permission from central office, he was of the opinion that future principals would need similar support to pursue further education. Fred, whose jurisdiction provided PD opportunities through its preservice leadership development program and inservice leadership-skill sustaining programs, also discussed the significant $600 saving that was realized by "using jurisdiction presenters" to deliver a modified version of the Franklin Covey Time Management program. Yvonne felt that, because it "becomes a drain on their budgets when they have to have the sub coverage," some provision for providing funding for the cost of substitute teachers while teachers and principals were away would facilitate their attendance at PD activities. Norman, when speaking about his administrative allowance, said that because "half of it goes to income tax," he would prefer occasionally being provided with additional dollars for professional development as part of his administrative allowance. Eleanor, the human resource officer of the small rural district, stated that providing "days-in-lieu" of nonschool days to attend PD activities might facilitate future principals' attendance at these professional growth

activities. "And then again," she added in a reminder about the interrelatedness of socialization and retention, "there's no guarantee that they are going to stay with you."

Quasi-Isolated Nature of Rural Schools

As illustrated by the following comments, participants whose school location or place of residence was located a distance from major centres spoke about typical difficulties and dilemmas that rural-school teachers and principals experienced in attending professional growth activities. Elaine, using the example of a teacher-evaluation course that had been available every Thursday from 4:30 to 7:00 p.m. at a location that was approximately 200 kilometres away from her school, explained the difficulty that rural-school teachers and principals would have in attending these courses. As she said, "We're so far away from the city that we can't attend. It would be almost impossible to go every Thursday at 4:30. That means you would have to miss a half a day of school." Edward, whose office is located a two-hour drive from Edmonton, spoke about the "major disadvantage" of rural people having to drive to the University of Alberta every Thursday night or every second Saturday because there were some people who can not and "will not do that kind of driving."

As Elaine claimed, decisions about taking the time to attend full-day workshops, conferences, or courses have to do with more than just the required travel-time. She said, "You have to understand you get caught up in your life in school, and it's not easy just to take a day off here and a day off there and travel to go to a course." Yvonne, who had a 0.875 FTE teaching assignment, explained that attending any of the above-mentioned PD activities also took away from quality time with the students she taught and would likely create a dilemma for future rural-school principals. Because of the above-mentioned time and distance inconvenience, some participants expressed the view that the University of Alberta would need to be more

willing to provide equitable opportunities for rural-teacher access to postgraduate programs.

Nature of the Family

Some participants referred to potential difficulties in accessing further education and other preservice or inservice activities because of the nature of future principals' families. Fred said that balancing family care with improving leadership-skill decisions would likely have a crucial impact on future principals. As he said, "Not only are you taking the additional pressures of the principalship, [but] you've [also] got to start working on your personal leadership skills, either through the inservice leadership development program or working on your master's program," so balancing family with professional-growth responsibilities "becomes a real juggling act." Elaine, who held the view that "the woman is the one that nurtures the kids at home and . . . takes them to all the sports and cultural things," said, "Because it is very hard to leave little kids, women have a handicap. They think that their kids have to be all grown up" before these women pursue further education. Consequently, Elaine felt that these courses should not be offered on weekends or evenings, "but during the day." Yvonne stated that there might be an attitude that women would not be able to remain in administrative positions for a variety of reasons. She said, "[More] families are making job decisions" based on opportunities for women rather than men, and as a result school boards and central office personnel should "show an openness to women." Finally, four participants perceived that the likelihood that future principals might be younger and have child-rearing responsibilities might have an impact on their access to both preservice and inservice professional growth activities. Universities, jurisdictions, and third-party PD providers would likely have to adjust their programming to suit the nature of future principals' families.

Learning Community Environment

Analysis of participant responses to the research questions related to the preparation and socialization of rural-school principals revealed three underlying commonalities about learning procedures that would be most conducive to the professional growth and socialization of future rural-school principals. First, as mentioned earlier, all participants agreed that the content of the preservice and inservice experiences and activities would need to be relevant to rural-school situations. As Matthew said, "Rural schools are so unique that [they should] offer some courses, sessions, or inservices—some professional development—in relation to the unique opportunities and challenges of rural settings." Participants listed a plethora of previously mentioned practical topics, and most spoke about the importance of research-based courses as well.

Second, participants generally identified conditions that would most likely enhance professional growth and socialization as those where future rural-school principals felt they would be supported, trusted, and valued. All participants discussed the importance of a supportive climate. Fred speculated about what would be needed for future rural-school principals. He spoke about how the "community really supported" him and how a "key factor" for his growth was the "excellent central service support" he received. To Yvonne it was very important "to be supported in our decision making by the central office *and* other principals." Elaine added the aspect of trust to the nature of support when she observed that her superintendent "lets me make my own decisions. She just says that 'these are the considerations, but you make it, and I'll support you.' So, so far she has given me total trust." Lawrence articulated that it was important and helpful for him that central office demonstrated trust in him by referring community-generated calls back to him. As he said, community members "know if they phone central office, they're going to be directed back here anyway. . . .

It's helped." Edward, human resource officer of a rural jurisdiction, stressed the importance of providing support for principals but indicated that there was a delicate balance between support and interference. He said, "It's really important for us to stay out of their faces, and at the same time . . . be supportive." In their jurisdiction, "trust and integrity and the openness" had to go two ways:

> In any working environment, if you read any of the literature on the excellent companies, there has to be a high degree of trust for the school—for the office—to be effective. And because our principals are in such a difficult role, there has to be a high degree of trust going *both* ways. So [we] work on that issue of trust and integrity and honesty so that if we're talking about issues, [the principals] don't have to be wondering whether there was another message that wasn't given. They need to know that when [central office personnel are] talking somewhere else, it's the same message. So that one is absolutely priority number one.

Edward also indicated, however, that if a principal made an error, he or she would be held accountable for that error, but they would "get a second chance" and all the support that they would need. Finally, Eleanor emphasized that future rural-school principals "need to feel they're valued, to know they're valued." Otherwise, "They're going to move along if they're not." Because his jurisdiction has a greater number of urban schools, Gordon, human resource officer of Gala Jurisdiction, felt that it was important to ensure that future rural-school principals feel that their input is valued:

> There's a conscious attempt to ensure that we have rural representation on committees. [It's] a perspective that's needed because of their unique circumstances. So a lot of attempts are made [to ensure] they're really well connected and involved in the school system as a whole.

Third, all participants spoke about the value of a collaborative, cooperative, and collegial environment. Gordon, human resource officer of Gala School Jurisdiction, believed that it would be important to ensure that rural-school principals have "a strong connection with the rest of the jurisdiction and that "they're networked well." David, principal of an isolated school located next to the provincial border, stressed the

importance of "establish[ing] camaraderie and a team approach" and working on things together, "like time management," during jurisdictional, quasi-sequestered administrators' meetings, which he called "advances" rather than "retreats" because, as he said, "a retreat means that you are going backwards." As exemplified by Fred's comment, all principals referred to the importance of learning while networking with other principals in the jurisdiction:

> I think it would be good to have opportunities two or three times a year where they would have a chance to network and just deal with common concerns that they may have, so that they could talk openly. I think that would be a good situation for prin pals to share ideas that worked for them or things that haven't worked for them. For me it might not be an issue because of the fact that I have so much experience already. But [for] a person starting out [as a] new [principal], I think having them network (again this goes back to the mentorship idea) with more experienced principals would really help.

Matthew suggested that these cooperative, collegial, learning-through-networking opportunities should extend beyond jurisdictional boundaries as well: "Rural settings are unique and not the same as urban or suburban settings." He also discussed the potential significance of "an association of rural school administrators that through networking and brainstorming can come up with ideas—sharing ideas—and better ways to facilitate learning." He added, "Maybe when there are teachers' conventions there might be sessions for rural schools and full-graded K-12 school settings." Norman, principal of a K-12 school, extolled the value of networking with other principals at provincial zone high school principals' meeting and advocated the formation of something similar for elementary principals.

Principal and human resource officer participants all emphasized the significance of a supporting, trusting, and valuing environment. All principal participants commented about the importance of acquiring knowledge, skills, and dispositions relevant to a rural-school context, and suggested that cooperative and collaborative interaction with other principals would be invaluable for future rural-

school principals. Participants generally expressed the opinion that the existence of an environment that was supportive of and encouraged preservice and inservice principalship training and socialization would contribute greatly to the attractiveness of the principalship and thus have implications for the recruitment and retention of future rural-school principals as well.

Summary

This chapter presented findings related to the preparation and socialization of future rural-school principals, both prior to and following a rural-school appointment. All participants indicated the socializing *and recruitment* value of (a) providing teachers demonstrating leadership potential with some form of overt encouragement to pursue their leadership potential, and (b) ensuring that principalship candidates participate in a variety of forms of formal and informal preservice leadership preparation activities. Participants offered a variety of types of inservice assistance that they felt would be beneficial to future rural-school principals. Participants addressed the benefit of formal orientation procedures, the value of mentorship for newly appointed principals, and the significance of university-offered, jurisdiction-offered, and other-party-offered preservice and inservice professional growth opportunities.

In addition to these preservice and inservice methods, participants also identified factors that would likely contribute to and facilitate the success of future preparation and socialization procedures. First, they all spoke about the importance of some form of financial assistance to facilitate future rural-school principals' access to both preservice and inservice socializing experiences, and they offered a variety of suggestions about the configuration of that assistance. Second, some participants, especially those from the two jurisdictions located a considerable distance from a major centre, submitted that universities, jurisdictions, and third-party professional

development providers would have to address access issues related to the quasi-isolatedness of rural schools. Third, some participants spoke about a need for professional development providers to consider and adjust for the changing nature of future rural-school principals' families. Fourth, all participants also concurred that an environment where people felt valued and trusted and was supportive of professional growth would likely facilitate the socialization of future rural-school principals. Finally, all principal participants stressed the importance of future rural-school principals gaining relevant rural-school socialization and training through cooperative interaction with other principals.

CHAPTER 7

Summary of Findings and Observations

The purpose of this chapter is to provide a summary of the findings of the study, followed by some of the researcher's personal observations about those findings.

Findings of the Study

The findings of this study are presented under three headings. First, when participants speculated about recruiting, socializing, and retaining principals in Alberta's rural schools, they told stories about the nature of their current life-world experiences as principals, or supervisors of principals, and extrapolated those stories to the future. These stories described a wide variety of roles and responsibilities for rural-school principals. These roles and responsibilities, influenced by a wide variety of people, places, and things, have been presented under the heading The Work-Life Landscape of a Rural-School Principal. Second, when participants hypothesized about recruiting and retaining principals in Alberta's rural schools, proposals were similar for both. Their responses to questions related to retention were often restatements of the recommendations that they provided to questions about recruitment, and vice versa. These suggestions have been presented under one heading, The Recruitment and Retention of Rural-School Principals. Finally, when these participants conjectured about the socialization of rural principals, they mentioned strategies that would likely assist future rural principals in acquiring and maintaining the knowledge, skills, and dispositions needed to perform their role adequately. These strategies have been presented under the heading The Socialization of Future Rural-School Principals.

The Work-Life Landscape of a Rural Principal

Participant stories illustrated the complexity and magnitude of the work-life landscape of rural-school principals, the nature of which would likely have considerable impact on the recruitment, retention, *and* socialization of future rural-school principals. The attributes and challenges of this complex landscape were characterized under six headings. Four headings were organized and presented under some of the operational areas identified in the *Project Ask* study (Kaida et al., 1980): School-Community Interface, Resource Management, Staff Personnel, and Curriculum and Instruction. Two additional headings relate to the delivery of Special Education services and administrative conflict issues.

School-Community Interface

Participants reported that schools in rural communities are often one of the few major institutions in the community, and as a result rural-school principals are usually viewed as occupying a "pillar-of-society" role within the community. Interpersonal interactions with the parents and members of the rural-school community at large are a vital aspect of a rural-school principal's work-life landscape. As one principal said,

> What I had to do to make this work for me. I really had to get involved in the community. Here, I go down Main Street, I know all the businesses, and I deal with all the businesses. I'm involved in Town Council, and when they are doing something in town, they will come here and involve me. There's real community interaction.

Principals with urban backgrounds spoke about their lack of understanding of the social and cultural differences between rural and urban school settings. Resident rural-school principals, those who resided in the vicinity of the school, observed that this aspect of their work-life landscape is a 24-hour-per-day, 7-day-per-week, 365-day-per-year responsibility. Whether they choose to be resident or non-resident, future rural-school principals would have to appreciate the unique nature of and be

able to work in a rural-school community. Participants said that future rural-school principals would certainly have to be prepared to spend the time to ensure that they made connections with the community.

All respondents commented on the general civility and behaviour of rural-school students. They indicated that rural-school principals would likely have to deal with fewer and less severe discipline problems than their urban counterparts do and that the generally well-mannered behaviour of rural-school students would likely be one of the characteristics of a rural-school principal's work-life landscape that future principals would find attractive.

Resource Management

Participants indicated that almost every aspect of a rural-school principal's work-life landscape is directly related to the financial responsibilities of the position. A summary of those aspects has been listed below. Participants said that a rural-school principal's resource management responsibility

1. includes difficult decisions about providing viable programs with limited enrolments and limited funding;

2. involves duplicitous conundrums in which rural-school principals would have to establish large, often multigraded classes in middle grades to compensate for either low-enrolment high school classes or smaller primary classes;

3. is comprised of situations in which they were in competition for students and the associated funding with neighbouring schools, which would then result in difficulty with program and staffing decisions;

4. includes difficulties coping with a per-student funding process that places many rural schools at a disadvantage compared to the larger urban or suburban schools;

5. places them in a situation in which they are often being evaluated by their communities on the basis of their ability to provide services and programming at their

rural schools, and by their jurisdictions on their ability to operate within budgetary guidelines; and

6. includes the challenge of dealing with all aspects of managing the school-based budget process. As one respondent noted when speaking about his resource-management responsibility, "I think the one thing that stands out to me is the site-based budget requirements."

Staff Personnel

Participants felt that many aspects of a rural-school principal's work-life landscape involve responsibilities and challenges that relate to the recruitment and supervision of teaching staff. They said that characteristics of rural-school principal's work-life landscape include

1. being faced with the challenge of competing for teachers with urban or suburban schools when the rural assignment often requires those teachers to teach combined classes, to teach a variety of subjects to a variety of grades, and to commit to extracurricular supervision in some form or another;

2. ensuring that they are knowledgeable about the technicalities and processes of clinical supervision, formal evaluation, and educational leadership for their new teachers, and then finding the time to carry out that responsibility;

3. providing many more formal teacher evaluations than their urban/suburban counterparts because beginning teachers tend to stay in rural schools for only a few years. Beginning teachers require both first- and professional-year formal evaluations in their first two years of service. One principal, for example, pointed out, "Because I often get new young people out of university, I'm looking at their full evaluations each year for two years in order for them to get their permanent certification."

4. balancing the responsibility of having to reduce staff because of declining enrolments while ensuring that they maintain a position for themselves; and

5. balancing the intricate, interpersonal strategies required for the development and maintenance of cooperative, collegial staff relationships when faced with the annual restructuring of classroom configurations and teaching responsibilities because of changing student population or staff dynamics.

Curriculum and Instruction

Most participants mentioned the challenges that rural-school principals experience when striving to meet the Alberta Department of Learning's legislated responsibilities of providing "instructional leadership in the school" and ensuring that "the instruction provided by the teachers employed in the school is consistent with the courses of study and education programs prescribed" (Alberta School Act, 1988, cS-3 s15; 1994, c29 s7). A summary of those challenges has been provided below. Participants spoke about

1. the onerous nature of becoming knowledgeable about the myriad of new courses of study, then budgeting for and facilitating the required inservice education prior to and during the implementation of these prescribed programs very often in multigraded classrooms;

2. becoming familiar with curriculums, especially in multidivision assignments, that are not congruent with their training and/or experience;

3. implementing prescribed programs or courses of study that are often cumbersome, inconvenient, and expensive for rural schools. Implementing the high school pure and applied math courses was mentioned as a particular concern; and

4. ensuring that teaching staff was familiar with both the content of and the instructional strategies for recently mandated curriculums. Inservice programs, for example, are often only available a great distance away from the school and are costly in terms of time away from classrooms, travel expenses, and substitute teacher costs.

These costs are often exacerbated by the reality that many rural teachers had multigrade and multisubject responsibilities.

Delivery of Special Education Services

Providing programming for students with special needs was identified as a particular concern for rural-school principals. Participants commented on

1. the challenge of providing services for those students who did not qualify for Special Education funding, yet required programming;

2. the challenge of providing services for students who qualified for Special Education funding when the funding did not cover the cost of providing the services;

3. the challenge of meeting parental demands, satisfying the Alberta Department of Learning's regulations and coding requirements, and counterbalancing these by providing specialist services when resource people were not readily available. One human resource officer contended that meeting the needs of Special Education students was "an enormous challenge in a rural area. . . . It is just absolutely frustrating" when a parent refers to an IPP and demands that the principal provide ancillary services when they are not available; and

4. the administrative time required, especially in schools with elementary grades, to meet the requirements for Special Education program delivery; and

5. the steep learning curve that they experience when they first encounter aspects of Special Education programming such as Program Unit Funding or Individual Program Plans.

Because Special Education programming is a crucial aspect of a rural-school principal's work-life, participants stressed that becoming knowledgeable about the intricacies of the Special Education funding and delivery process would need to be an integral part of any socialization process for *future* rural-school principals.

Administrative Conflict Attributes

All principal participants discussed personal or interpersonal conflicts that they experienced. The following is a summary of those that were presented:

1. the challenge of balancing the demands of management-task responsibilities with educational-leadership responsibilities when both are equally onerous;

2. the challenge for teaching principals of striking a balance between their "doing-what's-best-for-kids" responsibility with their fiscal balance-the-budget responsibilities and the consequent juggling of their teaching responsibilities with their administrative responsibilities. One participant said that there was the possibility of a rural-school principal "spending too much time in the classroom and not enough time supporting staff and dealing with students and parents";

3. the conflicts between these school-level administrative and teaching responsibilities with their out-of-school community, jurisdictional, or provincial responsibilities;

4. difficulties that they experienced when their training and experience did not prepare them for their multidivision assignments; and

5. the difficulty that they experienced in allocating appropriate amounts of administrative time to each of these conflictive responsibilities.

Observations Regarding the Work-Life Landscape of Rural-School Principals

Since the fall of 1993, when the Government of Alberta began a comprehensive restructuring of the education delivery system throughout the province, the work-life landscape of Alberta principals has been and continues to be transformed, particularly that of rural-school principals, which has become increasingly complex and onerous and has created conditions in which they have had to acquire additional skills. The overwhelming nature of the rural-school landscape appears to be one of the factors contributing to the decline in the quantity and quality of qualified candidates seeking a

rural-school principalship and at the same time encouraging existing principals to seek employment elsewhere.

It was apparent that most participants portrayed the work-life landscape of rural-school principals as being somewhat different from that of their urban or suburban counterparts. Even though most characteristics of the work-life landscape could be considered similar to those of urban or suburban principals, the unique combination of these attributes appear to make a rural-school principal's work-life landscape unique and challenging.

It was also apparent to the researcher that individual participants viewed aspects of a rural-school principal's work-life landscape differently. Some spoke about the appealing features of one aspect, others expressed preference for another, and yet others spoke about aspects they found unattractive. They all, however, spoke about the complex, dilemmatic, and time-consuming nature of the rural-school principalship and how it could affect future rural-school principal's disposition toward the position. Some of these participants felt that work-life attributes paralleled the listing of deterrents for qualified principalship applicants that were reported in a joint 1998 NASSP/NAESP study identified in the related literature (Educational Research Service and Gordon S. Black Corporation, 1998). The potential negative impact of these landscape attributes also parallels the findings of a 1999 Saskatchewan study in which Renihan (1999) observed that the "level of interest in the principalship among teachers is low, particularly in rural and small school contexts and it is difficult to attract well-qualified candidates" (p. 1). Renihan added that

> by far the most frequently identified reason as to why teachers do not come forward [to apply for rural principalship positions] relates to the perception of the overwhelming workload which characterizes the job, and the "hassle" that goes with it. Teachers and principals expressed apprehension about the work and time involved. (p. 8)

This Alberta study generally confirmed the findings of the NASSP/NAESP study (Educational Research Service and Gordon S. Black Corporation, 1998) and the Saskatchewan study (Renihan, 1999). It can be concluded that the multitude of challenges faced by rural-school principals does influence potential leadership candidates' and existing principals' attitudes toward the rural-school position and has a direct impact on a jurisdiction's ability to encourage qualified candidates to apply for and remain in a rural-school principalship. Also, because of the complexity of their role, one can conclude that future rural-school principals would likely require considerable training and socialization prior to and following their appointment.

Findings Related to the Recruitment and Retention

Participants indicated that a jurisdiction's ability to recruit and retain rural-school principals would likely be directly related to its ability to make that landscape attractive to teachers and current principals. Their suggestions were compiled, categorized, and presented under five headings: (a) Celebrating the Appeal of the Rural Context, (b) Providing Financial Incentives, (c) Providing Other Incentives, (d) Improving the Viability of Rural Schools, and (e) Recruiting People With a Positive Disposition Toward Rural Schools. Each of these is elaborated below.

Celebrating the Appeal of the Rural Context

Although there appeared to be some drawbacks to living in a rural community, participants indicated that the advantages of quality of life and personal fulfillment would be important and influential factors in the recruitment and retention of future rural-school principals. They expressed the opinion that a rural community is a wonderful, pollution-free place to live and to raise children. They suggested that a rural community is a place apart from the iniquitous conceptions of urban living in which drugs, gangs, and violent crimes are not concerns and in which there was the opportunity to live a short distance from work without the worry of excessive traffic

flow. They suggested that the selection of and proximity to recreational facilities and cultural opportunities would appeal to future rural-school principalship candidates and thus would also be important to promote.

Participants also mentioned the appealing features of being a principal of a rural school. Many indicated that rural-school principalships provided them the opportunity to continue teaching—a pleasurable part of their experience. Some spoke about the attractiveness of the opportunity as principal of a rural school to form close connections with staff, students, parents, and community members, and indicated that this high-profile, highly influential role allowed rural-school principals to contribute significantly to the success of their students and their school. Some participants spoke about opportunities for long-term stability, and others spoke of professional advantages for gaining a wide range of experiences and having greater career-advancement opportunities.

Finally, participants mentioned the advantages of being able to form closer, more personal relationships with rural students, whom they considered better behaved and more responsible than their urban counterparts, and the additional appeal of having greater opportunities to make a significant positive impact on the lives of rural-school students.

Providing Financial Incentives

Participants emphasized that, in order to recruit and retain future rural-school principals, jurisdictions containing rural schools *and* the Alberta Department of Learning would likely need to re-examine and modify four finance-related procedures for compensating rural-school principals.

First, all participants asserted that the administrative salary was inadequate and that increasing the allowance was essential. The after-tax dollars would have to be congruent with the overwhelming workload as well as compare favourably to those of

teachers with master's degrees and professionals in similar private-sector positions. A suggestion about reconstructing the calculation of a rural-school principal's allowance to reflect the nature of the responsibility was also presented. Second, all participants mentioned the inordinate amount of time that was required to complete the ever-increasing administrative and leadership tasks. Rural-school principals, especially teaching principals, would have to be provided with adequate administrative time for these tasks. Third, all participants indicated that financial support for both preservice and inservice professional development opportunities, educational leaves, substitute teacher costs, and release-time costs would all increase the appeal of the rural-school position, as well as enhance as the socialization, of rural-school principals and principalship candidates. Finally, some participants suggested a number of rural compensation considerations, including the provision for relocation costs, subsidized housing (teacherages and rent-to-own opportunities), travel allowance, and isolation allowances.

Providing Other Incentives

All participants indicated that it would likely require more than just financial incentives to appeal to future rural-school principals. Many stated that the importance of a jurisdiction's reputation for the encouragement, recognition, and support of their principals would be an integral part of what it was that would make a jurisdiction appealing. Some thought that a jurisdiction which actively encouraged and provided career advancement opportunities for aspirants of both genders would be successful in recruiting and retaining rural-school principals. All mentioned the appeal of and consequent need for working in an environment in which assistance from central office and outside agencies was readily available and in which they felt trusted and valued and consequently knew that their carefully considered decisions would be supported. Finally, some principal participants indicated that one of the negative features of a

rural-school principalship was the reality that the time-consuming nature of the position restricted the amount of quality time they had to spend with their families. Helping these principals improve the family-life/work-life balance would enhance the appeal of the position. Participants offered a variety of suggestions on how jurisdictions might compensate for the undesirability of this characteristic. Compensatory suggestions were as follows: increasing time for administrative responsibilities, decreasing teaching responsibilities, sharing administrative responsibilities, providing time management strategies, and offering psychological assistance programs.

Improving the Viability of Rural Schools

Some principals, especially those in multidivision schools, maintained that it would be important for future principalship candidates to believe that rural schools were viable alternatives to schools in larger urban and suburban areas. They explained that the availability of both financial and human resources had a direct impact on the operation of their rural schools, and they identified a number of resource-related obstacles such as difficulties with the curriculum change and curriculum implementation processes and implementing the recently mandated high school applied and pure math program. A majority of participants addressed the per-student or per-credit funding process and identified some dilemmatic finance-related decisions that they were required to make. Because of low enrolment, for example, rural-school principals were often required to make decisions (a) to combine two and three grades in order to keep a low-enrolment single-graded class somewhere else (usually in Grade 1), (b) to combine two and three junior high subjects, (c) to combine and cycle high school subjects in order to be able to offer them, (d) to offer some high school courses and not others, (e) to reduce administration time and preparation time in order to provide educational services to low enrolment classes, (f) to compensate for nonfunded or

underfunded special-needs students, and (g) to forego the purchase of items such as photocopiers in order to amortize the cost of a computer lab or vice versa.

Participants also spoke about human resource challenges. They all addressed the difficulties of hiring, supervising, and keeping teaching staff for multigrade, multisubject, and extra-duty positions. Some mentioned the difficulties of providing required services to special-needs children because of the unavailability of ancillary service personnel. Half of the participants spoke about the effects of competition for students with schools in neighbouring communities and that, in some cases, rural-school parents were faced with "Catch-22" situations between sending their children to the local school and sending them to a school in a neighbouring community that was able to provide more programs. These parental-choice decisions often placed some rural-school principals in a financial quandary. If they could not provide a program, they would not have the students; and if they did not have the students, they could not provide the program. All of these participant-identified dilemmas combined to threaten the viability of many rural schools. Most participants indicated that these resource-related paradoxical predicaments would deter potential principalship candidates from considering a rural-school position.

Many principals expressed frustration with their inability to provide adequate programming for all of the students in their charge and strongly suggested changes to the current levels of educational funding to rural schools. Some participants contended that the Alberta Department of Learning had based curriculum implementation and student funding decisions on economic reasoning and had not sufficiently considered the nature and challenges facing rural schools. They further suggested that the Alberta Department of Learning should re-examine its definition of equity and reconsider the importance of rural schools by providing resources commensurate to these unique realities of rural education. If rural schools were considered viable alternatives to urban

or suburban schools, principalship candidates would find the rural-school position more attractive.

Recruiting People with a Positive Disposition toward Rural Schools

Some participants suggested that jurisdictions should recruit and hire leadership candidates with rural backgrounds because they would already have an understanding of the rural-school culture. Identifying and providing preservice socialization to teachers with leadership skills from within a jurisdiction's rural schools and recruiting external candidates who had rural-school experience would likely have the effect of increasing both the quantity and the quality of candidates for rural-school principalship positions. As well, because of their influence, some participants felt that jurisdictions should consider the disposition of a candidate's family, because recruiting principalship candidates who already had a positive disposition toward rural schools which the immediate family shared would likely facilitate preparation and socialization into the rural-school principalship and also encourage rural-school principals to stay for a reasonable period of time.

Observations Regarding Recruitment and Retention

Enhancing the attractiveness of the work-life landscape for rural-school principals seemed to involve four processes. In the first place, participants indicated that it would be important for jurisdictions, as one participant said, to "brag up the advantages [and] publicise the good points" of living in a rural community. Second, participants believed that jurisdictions would likely need to find ways to compensate somehow for some of the less attractive characteristics of the work-life landscape. On the third level, participants contended that agencies such as the Alberta Department of Learning would need to change some things to reconstruct, as it were, the work-life landscape of a rural-school principal. As another participant observed, "I think that one of the big things is the 'powers that be' need to recognize more that small schools

have some very unique problems and things that have to be dealt with." On the fourth level, most participants suggested that rural teachers with leadership potential would be ideal candidates for future rural-school principalships. As was aptly expressed by one participant, leadership candidates with urban experience "are always looking for the city in the country, and they never really find it."

Many of the advantages of choosing a rural-school position were similar to those that influenced physicians' decisions to locate and stay in a rural practice (MacDonald & Associates, 1996). Participants and physicians both spoke about the advantages of a rural lifestyle, the recreational opportunities for self and family, and the proximity of friends and family. As MacDonald and Associates further reported, rural physicians found the challenge of a varied practice appealing (p. 21). This finding also paralleled the findings of this research in which participants spoke about the appeal of the all-encompassing, variety-filled role of being a rural-school principal (teacher, coach, community leader, *and* school administrator). On the other hand, because these additional responsibilities were often part of the rural-school reality rather than simply an opportunity for variety, many participants also discussed the negative consequences of having these additional obligations and offered suggestions on how to compensate for them.

The responses in the current study were generally consistent with the recommendations from the literature regarding recruitment practices. Participants suggested practices that would address the development of a talent pool (Miskel & Cosgrove, 1995; Thomas, 1997) from internal rather than external applicant sources (Castetter, 1996). Responses also confirmed the impact that job attributes—the work-life landscape—would have on applicant reactions toward the rural-school principalship which would thus directly affect the applicant pool for rural-school positions (Winter & Dunaway, 1997).

Participant suggestions were consistent with those in the research on recruitment and retention of educational and business leaders. The motivational effects of recognition, job-fulfillment, growth opportunities, and a supportive, trusting working environment (Barnett, 1998; Collison, 1997; Davenport, 1997, Saskatchewan Teachers' Federation, 1998) were all identified as key attributes of the rural-school work-life landscape that would likely contribute to the general satisfaction of future rural-school principals.

There appeared to be a high degree of conformity to the Lam and Cormier (1998) study of stressors for Saskatchewan rural-school principals. Aspects of a rural-school principal's work-life landscape that would likely require additional support and consume considerable amounts of time were similar to the most conspicuous external and internal stressors for Saskatchewan rural school principals (pp. 5-6). In fact, two of the Lam and Cormier recommendations were similar to those offered as recommendations of this study (see Chapter 8, Developing Principalship Candidates and Providing Conditions That Sustain the Appeal of the Position).

Participant contention that the current administrative salary was inadequate was consistent with the findings of the joint NASSP and NAESP research project in which it was reported that the primary factor that discouraged qualified applicants from applying for principal positions was that compensation was insufficient compared to responsibility (Educational Research Service and Gordon S. Black Corporation, 1998). This contention was also consistent with a Saskatchewan study which reported that "poor incentives, poor compensation and excessive responsibility" (Renihan, 1999, p. 8) deterred qualified applicants from applying for principalship positions.

The relationship between community members, the principal of the rural school, and the jurisdiction's leadership appeared to have the potential to become strained because of the nature of the rural principal's role. Parents and other

community members would like their local school to remain a viable alternative to other, often larger schools, and they wanted the local school to remain open. Perhaps these people had the perception that if the school that served as a community centre were to close, the community would eventually disappear. Community members appeared to want their principal to ensure that the school does, in fact, remain viable. However, the rural-school principal, having been given the fiscal responsibility to operate the school within the limits of the budget allocation, will often be faced with decisions to reduce staff, combine two or three classes, or eliminate program offerings because of funding issues related to insufficient enrolment, especially at the high school level. All of these actions tend to decrease the viability of the school and put pressure on parents to send their children to a larger neighbouring school and may also put the principal at odds with the community. An alternative might be to operate at a deficit, which then puts the principal at odds with the jurisdiction's central office personnel. Both of these solutions place the principal in a tenuous position. However, many principals, when faced with these difficult decisions, choose, as expected by community and staff, to increase their teaching load and reduce their administrative time. Thus they create conditions in which the position becomes less appealing, which is somewhat of a self-destructing circle, but a reality nonetheless.

Participants indicated that attitudes toward characteristics of the rural-school position would likely be varied. Numerous personal factors influence a somewhat delicate balance between those aspects of the rural principalship that future rural-school principals would find attractive and those that they might view as unattractive or unacceptable. Different combinations of characteristics of the rural-school work-life landscape would "tip the scales" one way or another and influence decisions to accept and stay in a rural-school position. In all likelihood, as long as this combination of characteristics fell and continued to fall within a realm of acceptable limits, which would vary from person to person, participants contended that qualified candidates

and current principals would be willing to accept and remain in a rural-school principalship.

Finally, issues regarding the amount of educational funding available from the Alberta Department of Learning and the effects of this funding on the provision of viable programs in rural schools were raised during the interviews. An examination of Alberta Learning's (2001a) *Funding Manual* regarding "the Purpose, Principles and Features of the Funding Framework" reveals the following mission statement:

> Public education is a commitment by the people of Alberta to all its children. The provision of public education is a provincial responsibility, one that is best discharged through a funding scheme which recognizes the right of all Alberta children to an equitable share of the province's resources in a universally accessible education system. (p. 1)

Within this statement is a commitment to all children, *including rural*, to provide an equitable share of resources. Further statements within this policy indicate that the primary principle of the *Funding Manual* is that "financial resources . . . are to be allocated to school jurisdictions on a fair and equitable basis that recognizes the similarities and differences among students and school systems and the associated costs" (p. 1). The second principle states that "the level of funding provided reflects the government's commitment to the provision of opportunities for every student to meet the standards of the province's curriculum" (p. 1). Statements by some participants in this research indicated that although the funding was being distributed equally, some of the children in Alberta's rural schools may not have been receiving *fair and equitable* funding.

Further to this matter, two of the key principles of *Our Students, Our Future: Alberta's Commitment to Universal Public Education* (Alberta Learning, 2001d) are as follows:

> *Access to quality education* – Every student has the right of access to a quality basic education that is consistent with the student's abilities and provides the

> knowledge, skills and attitudes to be a self-reliant, responsible, caring and contributing member of society.
> *Equity* – All students have equal access to a quality basic education regardless of where in the province they live. (p. 1)

Participants expressed the opinion that equitable access to a quality basic education was not the case for rural students, especially high school students. In addition to mentioning inequities in the provision of funding for students in rural schools, some participants also complained that the Alberta Department of Learning considers only large urban high schools when it mandates new curriculums, and, as a result, the smaller rural community high schools would not be able to offer these new programs. Simply put, many rural high school students could not access some quality programs unless they chose to leave the smaller community schools, because they were impossible to offer for financial reasons. This reality reduced the opportunity of many rural students to access a quality basic education in their community.

Other participants reported difficulties that they experienced with providing Special Education programs in rural schools because of financial and human resource inequities. The Alberta Department of Learning's statements about special-needs programming were as follows:

> Alberta Learning recognizes that students with special needs require special programs or services that are geared to their abilities. (Alberta Learning, 2001b, p. 1)

> Under the School Act, school boards are required to provide every resident student with an education. That includes providing access to Special Education programs for students with special needs. Whether a student is gifted and talented or has mild/moderate or severe [educational] needs, specialized learning programs provide the unique educational opportunities they need to reach their potential. (Alberta Learning, 2001c, p. 1)

The shortfall between the amount of funds that were available and the cost of providing programming for severe-needs students was identified by some participants as one area of difficulty. The Alberta Department of Learning provides approximately

$13,000 to $16,000 (Alberta Learning, 2001e) per student while the actual cost of providing services for those students is considerably higher, on average approximately $5,000 per student (Spencer Moon, personal communication, February 23, 2001). In addition, some participants spoke about difficulties in accessing special needs resource personnel in the rural areas. Resource personnel were either not available in rural areas or located in the larger centres and too expensive to access. In addition, the difficulties that small rural schools experience in providing other special programming because of the small class sizes were discussed. It appears that economies-of-scale advantages did not apply to many rural schools. Schools in which it was possible to have class sizes of 25 to 30 students could afford special programs, whereas schools with only 17 or 18 students per class could not, yet they were expected to provide these programs.

The situations mentioned appear to have contributed to a general questioning of the Alberta Department of Learning's espoused equality-of-access and fair-and-equitable-funding mission to provide opportunity for every student to meet the standards of the province's curriculum (Alberta Learning, 2001a, 2001b, 2001c, 2001d, 2001e). These rural study participants generally felt that the Alberta Department of Learning seemed to be committed to economic reasoning that favoured the larger urban and suburban schools.

A recent *Edmonton Journal* headline, "Alta. encouraging closure of beloved country schools" (Unland, 2001, p. A1), appears to accentuate viability issues surrounding rural schools. The writer stated that Alberta Infrastructure was carrying out "an audit of the physical condition of every school in the province" (p. A4) and presented discussions about the potential closing of one particular 104-student, rural elementary school because the building was in need of expensive repair or reconstruction and was considered small (pp. A1, A4). Perhaps this article identified the crux of the rural-school validity dilemma and its self-fulfilling nature. The current funding structure combined with the nature of current mandated programming, which

seems to be more suited to schools with larger student populations, may have created situations in which parents seek a better education for their children by sending them to larger centres. The school population declines, and these rural schools then become increasingly less viable. The Alberta Department of Learning, seeking economically efficient expenditure of funds, has become increasingly reluctant to repair or rebuild older existing schools or to construct new ones because of declining enrolments. Thus these schools become even less viable. Enrolment declines even further, and the rural schools close.

One could consider the plight of the 104-student elementary school as typical. Two of the schools in the current study, for example, were K-12 schools, each having approximately 200 students. In these schools the elementary grades, comprising two of the four divisions, both had approximately 100 students. If the high school portion of these schools were to close, the junior high portion would likely soon close as well. The school would be left with 100 elementary students, the building might not be repaired or rebuilt, and the elementary school would eventually close as well. Community members might believe that if their local school were to close, the rural community might disappear as well. Concerns about the viability of rural schools have a negative effect on the appeal of the rural-school principalship.

Findings Related to Socialization

In response to questions regarding the socialization of future rural-school principals, participants spoke about the importance of ensuring that rural-school principals acquire and maintain the knowledge, skills, and dispositions needed to adequately perform their role. It would, they felt, be essential that future rural-school principals be provided with or have access to socialization procedures both prior to and following their appointment. Participants also mentioned ways to enhance the delivery and effectiveness of these socialization procedures. Their suggestions were

compiled, categorized, and presented under four headings: (a) Preservice Socialization Procedures, (b) Inservice Socialization Procedures, (c) Access Considerations, and (d) Learning Community Environment. Each of these is elaborated below.

Preservice Socialization

Participants spoke about the value and significance of identifying and socializing potential rural-school principalship candidates. Teachers with leadership skills have often been covertly or informally socialized by being encouraged or mentored by their principal in a variety of ways. They begin to learn and internalize the norms, values, and behaviours generally accepted as being a part of an administrator's professional role (Hart, 1993). These leadership candidates may have been given leadership responsibilities and encouraged to attend professional growth opportunities and enrol in formal courses, for example. However, participants believed that this socialization process would likely need to become an overt, formalized process. They advocated actively providing preservice socialization by *cultivating* future principals from the ranks of rural-school teachers and even, as explained below, rural high school students with demonstrated leadership potential. As one principal indicated, "I'm saying that they need to look around on the staff and see which people might have good leadership skills and encourage them."

Participants also spoke about formal preservice socialization strategies that would likely improve the quality *and quantity* of rural-school principalship candidates, and they noted three types of formal preservice leadership training courses: those offered by the universities, those offered through the jurisdiction, and those offered through other agencies.

One principal suggested identifying potential candidates from rural-school Grade 12 students and that students who occupied active leadership roles should be encouraged to consider a teaching career and perhaps consider administration as well.

Another suggested the development of principal preparation courses that could be offered as part of the undergraduate teacher education program.

Although a master's degree need not be a mandatory requirement for attaining a rural-school principalship position, all participants contended that some form of university-offered postgraduate course work would likely be an important component of the ideal preservice preparation/socialization program. Others felt, on the other hand, that a master's degree prerequisite might actually deter potential leadership candidates from pursuing a rural-school principalship.

Those participants from the largest jurisdiction in the study spoke about the value of their jurisdiction's principalship development program. The human resource officers of the two smaller jurisdictions, however, lamented with some frustration their inability to provide a similar leadership development program. They proposed the formation of a coalition of jurisdictions and other educational agencies to develop and deliver a principalship preparation program. All participants referred to the value of principalship preparation programs offered by the Alberta Teachers' Association and College of Alberta School Superintendents.

Inservice Socialization

Participants also spoke about ways that rural-school principals would acquire and continue to acquire the necessary knowledge, skills, and dispositions *and* develop new understandings as the education milieu changes. They spoke about the importance of providing formal inservice orientation procedures and mentorship opportunities for beginning principals and newly appointed principals. They also discussed professional growth opportunities that would assist both newly appointed and experienced principals achieve the above-mentioned socialization. Participants said that some form of jurisdictionally offered orientation program for beginning principals or newly appointed principals was also essential. Principals new to a jurisdiction would likely

require more socialization than those hired from within, and beginning principals without previous experience or knowledge of rural settings would require considerably more. Most participants stated that both formal and informal opportunities to mentor with experienced rural-school principals would be an important aspect of the socialization of future beginning and newly appointed rural-school principals.

Participants also mentioned the key role of the above-mentioned professional growth opportunities in the post-induction socialization of future rural-school principals. All spoke about the benefits of taking postgraduate university courses while being immersed in the position. They also postulated that jurisdiction offered or initiated professional growth opportunities would play an important role in the future. Central office participants reiterated the need for the formation of leadership-training coalitions with provincial and out-of-province universities. They also spoke about improving leadership-skill-developing opportunities by providing access to outside-of-education business training programs.

All participants affirmed the value of the knowledge they gained during their attendance at educational workshops and conferences. They emphasized the significance of interactions with other principals, especially those from rural schools, and advocated the formation of an association for rural-school administrators. Some suggested that conference providers should consider planning and delivering sessions specifically directed at rural-school principals.

Finally, participants spoke about the significance of a rural-school principal's continued socialization by personally becoming involved in local, provincial, and national educational committees or organizations, by continuing professional reading, and by accessing information through the Internet.

Access Considerations

All participants maintained the importance of supporting future rural-school principals in their efforts to access these socializing professional growth opportunities. Many contended that this support would directly affect a candidate's desire to accept, recruitment related, and stay, retention related, in a rural-school principalship. First, they said that future rural-school principals and principalship candidates would need to be provided with some form of financial assistance to facilitate their preservice and inservice socialization. Second, they referred to issues related to a rural-school principal's ability to access these professional growth opportunities.

Participants referred to a variety of methods of providing financial assistance for existing rural-school principals and principalship candidates. They spoke about the need for direct financial assistance (a) to offset the cost of postgraduate studies by providing paid educational leaves and reimbursement for courses taken, and (b) to attend workshops or conferences by providing reimbursement for registration, travel expenses, living expenses, and substitute teacher costs. They also mentioned indirect financial assistance by having jurisdictional personnel arrange or deliver university credit courses and other leadership development workshops or conferences. Principals stated that funds from the jurisdictional budget as well as the school budget would need to be earmarked for these professional growth opportunities. But, they emphasized, it would be very important that the availability of these funds not affect the ability of a school to offer viable programs. These funds should be in addition to and not *at* the expense of student program funding.

Participants referred to difficulties rural-school teachers and principals experienced in their attempts to access these socializing activities. Due to the quasi-isolated nature of rural schools, they emphasized that attendance at professional growth activities often involved a great deal of travel, required a significant amount of

their time, and incurred a substantial budgetary expense. As an example, attendance at half-day meetings or workshops often meant a full day away from school, full-day meetings meant either a very long day or a day and a half away, and early-evening meetings meant having to leave school early. Many participants specifically mentioned difficulties they experienced attending university courses and expressed the view that the University of Alberta would need to be more willing to provide equitable opportunities for rural-teachers' access to postgraduate programs. As well, because of a rural-school principal's teaching load, as much as 0.875 FTE, some principal participants spoke about difficulties in arranging a compromise between program delivery continuity, school budget costs, and the need to attend these socializing activities. Some participants also speculated that both principalship candidates and future rural-school principals would likely have child-rearing responsibilities, and attendance at preservice and inservice activities would create difficult family decisions related to quality family time and child-care responsibilities. They indicated that, in order to enhance the appeal of the rural-school principalship, future principalship candidates would need to be able to envision a balance between family-care responsibilities and professional growth decisions. Some participants, as a result, contended that jurisdictions, universities, and other professional development providers would have to find ways to adjust for the nature of future principals' families and compensate for the above-mentioned deterrents.

Learning Community Environment

Participants contended that an environment that was supportive of professional growth, in which people felt valued and trusted, and in which relevant rural-school knowledge was cooperatively gained through interaction with other principals, would facilitate and even enhance the socialization of future rural-school principals. They emphasized the need for practical learning and listed a plethora of

knowledge, skills, and dispositions, such as conflict resolution, budgeting, timetabling, staff evaluation, and Special Education procedures, that would be required components of the socialization of future rural-school principals. They also mentioned the importance of research-based learning. Participants indicated the appeal of acquiring these skills in a collaborative, cooperative, and collegial environment and ascribed particular importance to being supported, trusted, and valued by supervisory personnel, colleagues, and the community. Finally, they highlighted the value of intellectual interaction, shared inquiry, and networking with other principals from rural and urban areas.

Observations Regarding Socialization

Participants in the current study appeared to place considerable importance on, as it is referred to in the related literature, the professional socialization of future rural-school principals. They indicated that this preservice socialization, as labelled by the researcher, would likely help rural teachers internalize many of the norms, values, and behaviours of a rural-school principal's professional role. However, they indicated that part of the difficulty with finding teachers who were willing to consider a rural-school principalship might have been related to the complexity and demanding nature of rural-school principals' work-life landscape. It appeared that, because of this reality, there were fewer teachers engaging in, as Griffiths et al. (1965; as cited in Miklos, 1988) described it, "GASing behaviours" or "getting the attention of superiors" (p. 66), which would likely require jurisdictions to actively identify, recruit and socialize rural teachers with leadership potential for the rural-school principalship.

The findings of the current study reaffirm a need for the recommendations presented in two previous research studies from the Alberta context. Some recommendations from this study are similar to those reported in the related literature by Thomas (1997) and Murphy (1998). Finally, the findings of the current study

could also be arranged in a similar manner to the categories of socialization studies reported in the related literature by Hart and Weindling (1996). They examined a multitude of research about the socialization of principals and reported five "features of preparation programs for school leaders common around the world" (p. 309). Consequently, using those five features as a guide, participants in the current study indicated the following as exemplary methods to socialize future rural-school principals into their leadership role:

1. They placed a great deal of emphasis on the preappointment or preservice learning as part of a combined preparation *and* recruitment process for future rural-school principals. Considerable emphasis, however, was also placed on the importance of postappointment learning as a combined socialization and retention process.

2. Both informal and formal learning were identified as being integral to the socialization of a rural-school principal. The importance of a deliberately structured process to identify and provide formal and informal learning opportunities for potential principalship candidates was identified as being an important consideration in the recruitment and socialization of future rural-school principals.

3. Experiential learning was generally identified as being more important than formal study at a university or college. However, whether experiential or formal, considerable emphasis was placed on learning that was relevant to the rural-school context.

4. Respondents whose jurisdictions did not provide a formal leadership preparation program placed more emphasis on the importance and value of an induction or orientation process. All respondents placed considerable emphasis on the importance of support after appointment to the rural-school position.

5. Formal and informal mentors were identified as likely to play an important part in the socialization of rural-school principals.

CHAPTER 8

Overview, Implications, and Reflections

The purpose of this chapter is to present an overview of the study and its implications. This chapter concludes with the researcher's reflections in order to provide additional insights into the study.

Overview

An analysis of the demographics of school-based administrators in Alberta indicated that by the year 2010 approximately 1,400 principals and 950 vice-principals would be eligible to retire (Alberta Education Information Services). This statistic indicates the likelihood that Alberta's school jurisdictions would have difficulty replacing these about-to-retire principals. When examined in light of the recent findings of Eckstrom and Fischer (1997), this difficulty would likely be more pronounced in rural schools. Eckstrom and Fischer discovered that Alberta superintendents were of the opinion that the number of experienced principals wishing to resign their positions was increasing and that the number of vice-principals wishing to apply for principalships was decreasing. The same research also revealed that superintendents expressed dissatisfaction with both the quantity and quality of applicants for available principalship positions. Demographic projections coupled with the Eckstrom and Fischer research indicates that Alberta jurisdictions will likely face a shortage of qualified candidates to fill future rural-school principalships.

Research Questions

The purpose of this study was to strive to identify and describe possible recruitment, socialization, and retention strategies that would likely ensure that Alberta rural schools continue to enjoy effective instructional and administrative leadership. This investigation addressed the following research questions:

1. What strategies would be required to recruit qualified people to rural principalship positions?

2. What would be considered exemplary methods to socialize future rural principals into their leadership role?

3. What might be necessary to encourage future rural principals to stay in their administrative positions and remain within their jurisdictions?

Method and Design

The study was conceptually framed within the assumptions of a naturalistic inquiry and an interpretive life-world approach. Through the use of interviews, the researcher got close to and listened to rural leaders talk about focussed projections in relation to their present-day life-world experiences (Bogdan & Biklen, 1998; Lincoln & Guba, 1985; Kvale, 1996). The researcher utilized the knowledge of 10 rural educators in leadership positions in order to capture their perspective of the socially constructed nature of the rural-school principalship and to discover how their current social experience might have an impact on the recruitment, socialization, and retention of future rural-school principals.

An informal pilot study of two rural-school principals assisted in the development of the interview schedule. These participants were selected from the attendees of the 1999 Educational Leadership Academy. Both worked in school jurisdictions different from the jurisdictions selected for the main study.

The main study was undertaken using a purposeful sample of 10 educators in leadership positions. The purposeful approach provided representation of beginning rural-school principals, experienced rural-school principals, and central-office human resource officers. Participants were selected from three Alberta public school jurisdictions. One bordered a major Alberta city; the second bordered a neighbouring province; and the third was a rural Catholic separate jurisdiction. Three of the

participants were women, one in each category, and seven were men. All principal participants were married. Schools ranged in size from 75 to just over 500 students. Four of the schools contained students in grades K – 12, one contained K – 9 students, one K – 8 and one K – 6. The schools were located in communities with populations ranging from just over 200 to approximately 5,000 (Alberta Municipal Affairs, 2000).

Information was collected in two sets of semistructured interviews which were transcribed and open coded. Initial analysis of information collected was undertaken by grouping responses according to the research questions, the gender of participants, the experience of participants, and school size. However, further analysis revealed that the information was more logically compiled, framed, and presented under three headings: The Work-life Landscape of Rural-school Principals, Findings Related to Recruitment and Retention and Findings Related to Socialization.

It is important to note that this research was a thick description of some rural-school principals' and rural-school jurisdiction human resource officers' opinions about what might be required to recruit, socialize, and retain rural school principals in the future. Consequently, whether or not the findings of this research are transferable or generalizable to other contexts will have to be determined by the reader and, as Lincoln and Guba (1985) indicated, other potential appliers (p. 316).

General Conclusions

Five general conclusions were drawn as a result of the research.

1. The work-life landscape of rural-school principals was both onerous and unique and will have a direct effect on a jurisdiction's ability to recruit, socialize, and retain rural principals;

2. A jurisdiction's ability to recruit and retain future rural principals will be directly related to a its ability to make the rural principalship attractive;

3. Recruiting qualified people with a positive disposition toward rural schools will likely facilitate better socialization and retention of future rural-school principals;

4. Future rural principals will require considerable preservice and inservice professional development, socialization, and training.

5. A supportive learning-community environment would not only enhance the socialization of future rural-school principals but would likely be attractive as well.

Implications for Practice

This study identified and described possible strategies for recruiting, socializing, and retaining principals in rural Alberta schools. As indicated in the related literature, recruitment, socialization, and retention are all intricately interrelated, and factors that affect one would likely have an impact on the others. As a result, the findings of this study do not necessarily address each of the three research questions separately, but rather according to the nature of the suggestions. With that in mind, in order to ensure that Alberta school jurisdictions recruit, socialize, and retain qualified principals for rural schools in the future, Alberta jurisdictions, the Alberta Department of Learning, and other educational agencies should institute the following strategies. First, these agencies should examine ways to help rural-school principalship candidates and current principals to appreciate the rural-school principalship by emphasizing and celebrating attractive aspects of the rural-school culture. Second, they should take measures to compensate for the decrease in the quantity and quality of potential candidates *and* the increase in the number of principals choosing to leave their rural-school positions by implementing procedures to enhance the attractiveness of the position. Third, they should identify and socialize principalship candidates from within rural schools. Fourth, they should provide conditions that sustain the appeal of the position and provide for continuous socialization. Fifth, they should examine ways

to reconstruct aspects of the rural-school principal's work-life landscape that make the position unattractive. Each of these suggestions is elaborated below.

Emphasize and Celebrate the Rural-School Principalship

It appeared that many factors might influence a rural principal's and potential principal's satisfaction about his or her job or profession. How a rural principal or a potential principal feels about his or her work life has a direct affect on his or her satisfaction. The expressions "Attitude is everything!" and "Your attitude is like a boomerang. What you throw out is what you get back" also indicate that individuals have a certain amount of control over that satisfaction. Three methods of enhancing rural-school principals' and principalship candidates' attitudes towards the position are presented here. Consider the lyrics written by Arlen and Mercer (1945): "Accentuate the positive, eliminate the negative; . . . spread joy to the maximum, [and] bring gloom to the minimum." As a result, jurisdictions should (a) emphasize and celebrate the positive aspects of the rural-school culture, (b) make an attitudinal commitment to creating an environment of trust and support for those in the rural-school position, and (c) seek candidates who are positively disposed toward a rural-school position.

Emphasize and Celebrate the Positive Aspects of the Rural-School Culture

A positive initial recruitment strategy would be, as Winter and Dunaway (1997) suggested, "[to] construct job messages containing job attributes with maximal applicant appeal" (p. 150). As well, within their advertisements and promotional material, jurisdictions should emphasize the advantages of a being a principal in each rural-school context—the advantages of living in a rural community and being principal of a rural school. Finally, during district administrative meetings, the jurisdiction's personnel should continue to emphasize and celebrate the positive aspects of the rural-school context.

Create an Environment of Trust and Support

School boards, central-office personnel, and local community leadership, including the school council, appeared to have considerable influence on the attractiveness of the rural-school position. Community attitudes and values will manifest themselves during personal interactions with the teaching staff and the principals. The jurisdiction's attitudes, values, and integrity will be manifested during personal interactions with the teaching staff and the principals and in the regulations, policies, reporting requirements, and management procedures. It will be important for both of these groups to be aware of the impact of their influence and to make a commitment to create and maintain an environment of trust and support for the future rural-school principal.

Seek Candidates Positively Disposed to a Rural-School Position

Some participants contended that people with rural-school experience or rural backgrounds would likely have a greater understanding of and appreciation for the rural-school context than those with urban backgrounds do. The work-life landscape of a rural-school principal was also identified as being somewhat different from that of a principal in urban or suburban areas. Because of these factors, jurisdictions should (a) honour and affirm the value and potential of rural-school teachers by recruiting and preservice socializing potential candidates who have had rural-school backgrounds, (b) recruit and select candidates who have a positive disposition toward rural-school teaching or principalship positions, and (c) select candidates whose families have a positive disposition toward the rural-school context.

Implement Procedures to Enhance the Attractiveness of the Position

Jurisdictions should take measures to compensate for the decrease in the quantity of qualified candidates *and* the increase in the number of principals choosing

to leave their rural-school positions, by implementing procedures to enhance the attractiveness of the rural principalship by providing incentives to enhance the appeal of the rural-school position. Participants indicated that a number of financial factors would likely influence future principals' decisions to choose and to remain in a rural-school position. These incentives are presented under the following headings: (a) Professional Development Considerations, (b) Administrative Allowance Considerations, (c) Administrative Time Considerations, (d) Time-Off Considerations, and (e) Rural Compensation Considerations.

Professional Development Considerations

The ability to access professional development opportunities was important for the participants in this study and would likely have implications for the future. Jurisdictions should provide financial support for the preservice and inservice socialization of their principals. Financial assistance to offset the cost of postgraduate studies and attendance at workshops or conferences should be provided through reimbursement for workshop and course costs, such as registration fees, travel expenses, living expenses, and substitute teacher costs, and through paid educational study or sabbatical leaves.

Administrative Allowance Considerations

Participants contended that the financial remuneration that future principals receive would have implications for a jurisdiction's ability to attract and retain rural-school principals. Jurisdictions should increase the administrative allowances for rural-school principals. These should be commensurate with the responsibility of the position, significantly higher than that of a teacher with a master's degree, and comparable to the salary of a person in a position with similar responsibility in industry. A method to reconstruct the administrative allowance structure so that it

more realistically reflects the nature of the rural-school position is presented under the "Re-construct the landscape" section later in this section.

Administrative Time Considerations

Participants highlighted, as one respondent said, "the lack of time in which to get things done." They stated that considerable amounts of time were required for rural-school principals to complete the leadership tasks at their schools and that the educational leadership function often suffers because the management function requires a substantial amount of time. Van Tamelen (1999) described the tension between leadership and management as a paradox:

> For the participants in this study, [the tension] has been intensified by the restructuring-induced changes to expectations they [Alberta principals] faced in their roles. In particular, the financial aspects associated with site-based budgeting, new planning and reporting procedures, and the added organizational tasks associated with facilitating school councils were representative pressures of causing the principals to be more managerial at the cost of less time devoted to educational leadership. (p. 209)

Participants in the current study indicated that the above-mentioned paradox was intensified even further because of numerous additional pressures. The most significant pressure was the tendency for rural-school principals to designate teaching responsibilities to themselves in order to provide additional staffing and meet the needs of the students in their schools. Other pressures included duties such as jurisdictional and provincial collaborative decision-making, curriculum implementation, and community responsibilities. As suggested by participants in the current study, pressures that were created by these tensions and exacerbated by the lack of time to complete administrative responsibilities have resulted in conditions that would likely be very unattractive to future rural-school principals. Having enough time to complete the variety of administrative tasks would increase the appeal of the rural-school principalship. Consequently, jurisdictions should provide rural-school principals with

adequate administrative time to complete their leadership responsibilities. Perhaps a starting point would be to designate a minimum of 0.75 FTE administrative time for schools with populations under 100, with additional time prorated on the basis of the number of students or the number of divisions in the school.

Time-off Considerations

Many participants expressed concern over that the amount of extra time principals spent at school away from their families. School jurisdictions should examine a schedule of additional days off in lieu of extra days worked to increase the appeal of the rural-school principalship.

Rural Compensation Considerations

Participants suggested that the cost and availability of housing or accommodation as well as the cost of travel would have an impact on the attractiveness of the rural-school principalship. School jurisdictions should consider providing some form of incentive to offset the negative effect of these costs. They could provide relocation costs and subsidized housing (teacherages and rent-to-own opportunities) for principals who choose to live near their schools, as well as travel allowance for those who did not. Jurisdictions could also examine other incentives such as isolation pay and travel bonuses related to the school's or community's distance from a major urban centre. These incentives could be presented as a menu of choices. Perhaps these could be similar to or a modification of the Queensland, Australia, Remote Area Incentives Scheme. The intent of this scheme was to "encourage experienced, quality teachers to move [and] to teach in remote and rural areas and then to remain in those schools," and included additional cash benefits for remaining longer than three years, concessions for leaves, travel concessions, and teacher housing (Education Queensland, 1999, p. 1).

All of the above-mentioned would have substantial financial implications for school jurisdictions containing rural school. These have been addressed in the Reconstruct the Landscape section.

Identify and Socialize Principalship Candidates

Participants suggested identifying and socializing future rural-school principalship candidates. Two potential sources were identified: (a) student nominees, and (b) teacher nominees.

Student Nominees

Some participants indicated that by planting the suggestion early, jurisdictions might be able to enhance the quantity and quality of future principalship candidates. At the earliest level, rural high school students with leadership skills could become potential candidates. Jurisdictions should strive to encourage these students to become teachers. Scholarships and bursaries could be a part of that process. At the next level, those Alberta's universities having faculties of education could also have a hand in encouraging students to consider rural-school teaching positions and perhaps place the principalship on their career paths. Education faculties could address the benefits of students becoming rural-school teachers by speaking about the opportunities for positions and the positive aspects of being teachers in a rural school. They also could enhance prospective teachers' understanding of the rural-school context by encouraging students to acquire one round of their field experience in a rural setting. The Alberta Department of Learning, rural jurisdictions, and municipalities could help faculties of education facilitate this process. Finally, faculties of education could provide undergraduate courses with the purpose of developing an understanding of and acquiring skills for a future school-level administrative assignment.

Teacher Nominees

Participants in the current study placed considerable value on the importance of creating conditions that would nurture the development of future rural-school principals. They indicated that teachers on the staffs of rural-schools could be the school leaders of tomorrow and would be an ideal source of potential principalship candidates. Specifically, jurisdictions should create conditions in rural schools in order to ensure that

1. existing principals identify potential leadership candidates from within the teaching staffs of rural schools and provide those candidates with overt encouragement to engage in and pursue formal and informal preservice leadership skill developing courses, workshops, and experiences;

2. potential leadership candidates are provided with mentorship opportunities, such as job-shadowing, with rural-school principals;

3. potential leadership candidates have access to formal leadership-developing courses that are relevant to rural schools. Jurisdictions should either develop and provide these courses themselves or broker opportunities to attend these courses by forming liaisons with other jurisdictions, faculties of education, and various other interested parties, such as Alberta Teachers' Association, the College of Alberta School Superintendents, universities, and regional consortia.

Participants in the current study also emphasized the role of universities in developing potential rural-school principals. An appropriate initial strategy would be to restate one of Lam and Cormier's (1998) recommendations from an earlier study involving rural-school principals in Saskatchewan: "Universities offering educational administration programs should furnish aspiring school administrators with meaningful managerial and political skills which will prepare them more adequately for a transformed leadership role in an increasingly turbulent environment" (p. 7).

Providing Conditions that Sustain the Position

Sustaining the appeal of the rural-school position appears to require more than financial incentives. When participants speculated about incentives other than financial that would encourage future rural-school principals to remain in their rural-school positions, they often spoke about conditions that would help them continue to grow professionally. When they discussed these conditions that would help them to become better principals, they mentioned (a) the importance of providing formal and informal induction into the rural-school position, (b) the need to provide opportunities for continuous professional growth, (c) the need to provide ongoing jurisdiction and outside agency support, and (d) the need for a trustworthy, collaborative, collegial climate that sustains growth and encourages succession—a learning community environment.

Providing Formal and Informal Induction

Regardless of whether or not they came from a rural background or were internal appointees, participants said that newly appointed principals often experienced challenges in adapting to each particular rural-school context. Principals hired for multidivision rural schools said that they experienced some challenges adjusting to the eccentricities of grade levels for which they were neither trained nor had experience teaching. Access to Special Education funding, reporting procedures, and program delivery was reported to be somewhat vexing for the principals in this study as well. Consequently, jurisdictions should do the following:

1. Provide formal orientation and induction that would include the provision of assistance with existing policies and procedures, rural-school specific administrative tasks, the nature of the school, and the nature of the community.

2. Facilitate formal and informal mentorship opportunities for newly appointed principals.

3. Ensure that newly appointed principals, especially those in schools with elementary divisions, are oriented to all the intricacies of Special Education funding and program delivery.

Providing Opportunities for Continuous Professional growth

Principal participants of the current study were desirous of and gained some satisfaction from becoming better at their position, and they indicated that future rural-school principals would likely be eager to enhance their personal leadership skills as well. They asserted that jurisdictions should provide an atmosphere that encourages principals (and teachers) to engage in continuous professional growth. Jurisdictions could take measures to facilitate the development of this atmosphere by providing financial support for and the moral encouragement to seek further university education and attend other courses and workshops. Principal participants in the current study indicated a preference for attending courses and workshops that were relevant to their rural-school work-life and that provided them with opportunities to interact with other practicing administrators. It would be important for jurisdiction's personnel and university course and workshop providers to note these preferences.

Finally, all participants spoke about experiencing difficulties keeping up with the quantity of changes, such as financial reform, new roles and responsibilities, school councils, site-based management, the implementation of new curriculums, and so on. They suggested that future rural-school principals would require opportunities to become familiar with changes in the future. It is appropriate to reiterate another of Lam and Cormier's (1998) recommendations regarding similar circumstances in Saskatchewan: "School divisions, in conjunction with the faculties of education, should provide on-site support to principals confronted with unfamiliar external challenges. This should include inservice activities designed to orient and equip principals to deal with new role expectations" (p. 7).

Providing Ongoing Support

Participants contended that rural-school principals should be able to solicit and receive assistance with various aspects of their work-life and that the provision of support from jurisdiction and other support-group personnel would have an impact on the satisfaction of future rural-school principals.

Central office personnel should be available for help with school-related matters such as district protocols and procedures or decision-making advice, and the participants added that jurisdictions should clearly communicate who to contact, depending on the circumstances. In addition, given the understanding that a principal's decisions were within reasonable limits, it would be important for central office personnel and the school board to communicate to the principal, the staff, and the community in general that they trust and support the decision-making ability of their principals.

The level of assistance from various support services personnel appeared to be an important influence on the work-life of a rural-school principal. School support agencies such as the RCMP, social services, or public health services should make themselves available to assist rural-school principals with common concerns. These services should be coordinated to avoid duplication and conflict of services.

Providing a Learning Community Environment

Participants maintained that many aspects of a rural-school principal's work-life landscape contribute to their satisfaction or dissatisfaction in their position. Many of the overriding factors that would likely contribute to future rural-school principals' satisfaction would be attitudinal in nature. Participants in the current study often emphasized the value of working in an environment where principals feel valued, trusted, and recognized. They spoke of an environment in which ethics, integrity, and people are important and in which professional growth and career advancement are

encouraged. Participants speculated that a working environment in which there is a sense of a common purpose and connectedness within the jurisdiction, in which collegiality and camaraderie are a part of the jurisdictional culture, and in which rural-school principals are encouraged to communicate with other principals within the jurisdiction and the province would be appealing to future rural-school principals. Jurisdictions should make efforts to address all of the above-mentioned attitudinal and environmental factors to provide conditions that will be attractive to future rural-school principals.

Reconstruct the Work-life Landscape

Participants advised that some aspects of the work-life landscape would likely require some modification to enhance the appeal of the rural-school principalship. They addressed four general areas that would require change. First, participants expressed concern about the continued viability of some rural schools and intimated that the Alberta Department of Learning does not sufficiently consider rural schools when they implement some of their recent changes, such as financial reform, new roles and responsibilities, site-based decision making, new curriculums, technology integration, and the reorganization of Special Education. As one respondent said, "We need to let [the Alberta Department of Learning] know that there are small schools out here that just can't possibly offer the things that you are trying to push down on us." Respondents concurred with Eckstrom and Fischer's (1997) research which reported that the viability of rural schools was decreasing as a result of these changes. As a result, they suggested three ways to improve the viability of future rural schools. Second, participants also expressed opinions about a rural-school principal's administrative allowance and offered a method of recalculating that allowance that would likely appeal to future rural-school principals. Third, female participants suggested that the rural schools and communities would need to place greater emphasis

on the value of female candidates for the principalship. Finally, participants offered ways to increase future rural-school principals' and principalship candidates' ability to access professional development opportunities that would increase the appeal of the position.

Improving the Viability of Rural Schools

Alberta Learning (2001a) stated its commitment to work "with its partners to build a learning system that meets the needs of our children" and that "public education is a commitment by the people of Alberta to all its children" (p. 1). As of December 2000, 33% of students in Alberta attended rural schools (Ken Poon, personal communication, March 7, 2001). Respondents indicated that the Alberta Department of Learning and its partners in the delivery of educational services should re-examine and renew their commitment to the children in Alberta's rural schools. They provided suggestions about (a) revising the distribution of funding to basic instruction, (b) providing additional resources for rural Special Education students, and (c) revising the curriculum implementation process.

Revise the distribution of student funding. Some participants in this research indicated that although funding for education was being distributed equally on a per-student basis, it was not being distributed in a fair and equitable manner. As stated by a participant in the current study:

> They have to really define equity. You know, what does equity mean? We all have shoes, but they should all fit. It doesn't do you any good if you have a pair of shoes that doesn't fit. You can't call that equity. And that's the way it's set up now.

They indicated that rural students were not able to access a quality basic education because of where they lived and thus, when compared to students in larger centres, were not provided with equal opportunity to meet the standards of the province's curriculum. The Alberta Department of Learning should demonstrate the

importance of the rural population and reconstruct the current funding formula to include greater financial consideration for the demographic realities of the rural-school context. Further research would be required to determine appropriate levels of funding.

Provide additional resources for rural Special Education students. Participants contended that the availability of both financial and human resources had a direct impact on the delivery of Special Education programs in rural schools. The population of the rural school, its distance from a larger centre, and the geographic and demographic size of the jurisdiction all affected the amount of human and financial resources that were available for Special Education. As such, partly because of economies of scale, smaller, more rural schools often appeared to have considerable difficulty providing the personnel and resources to offer adequate programming for the special-needs students in their care. Consequently, the Alberta Department of Learning and its partners should reconstruct the funding process for these rural special-needs students—those who are classified as gifted, mild moderate, or severe—to provide resources that are commensurate with the demographic and human resource realities of the rural-school context. Further research will also be required to determine appropriate levels of funding for these rural special-needs students.

Revise the curriculum implementation process. Recently, there have been numerous modifications to the mandated curriculum within the province which were projected to continue on a 10-year rotation schedule (Alberta Learning, 1999). Depending on the number of grades or divisions in a rural school, the current rate of curriculum implementation could require that some rural schools implement at least one new curriculum per year. Participants identified difficulties associated with these implementations, and some wondered if the Alberta Department of Learning had considered the impact of their curriculum mandates on these low-enrolment, multidivision rural schools. At the high school level the 1999 implementation of the pure and applied mathematics courses is a particular point-in-case. Consequently, the

Alberta Department of Learning should revise its procedures for the curriculum development, implementation, and delivery process to reflect the economic and demographic realities of rural Alberta schools.

Recalculating the Administrative Allowance

In Alberta a principal's annual income has traditionally been determined by combining his/her salary as a teacher (a sum dependent upon years of training and experience) and an additional allowance based on the number of students or the number of full-time equivalent professional staff at the school. Participants felt that there should be an increase in the administrative allowance for rural-school principals. They also indicated that the amount of responsibility and time required for the position varied depending on factors other than just the number of students or teachers they supervise. The work-life landscape, for example, of a principal of a multidivision school is more demanding, requires more time, and has more responsibility than that of a principal of a similarly sized, single-division school. Consequently, school jurisdictions and the Alberta Teachers' Association should cooperate to reconstruct the administrative allowance so that it also reflects other factors such as the number of divisions that a principal supervises and the distance from a major urban centre.

Revising the Instructional Block Funding

Within the current funding structure in Alberta, school-based administrative costs are drawn from the instructional block of funds—the pool of funds that finances those costs directly related to the provision of instruction to students, such as staffing, instructional supply, and programming costs. As a result, administrative allowance and benefits costs have a direct effect on the amount of funds that are available for instruction at the school level. Participants indicated that the reality, for example, of relinquishing administrative time to provide additional student instructional time appears to have created conditions that diminish the appeal of the rural-school

principalship, especially in the smaller schools. However, when speaking about implementing strategies that would enhance the attractiveness of a rural-school principalship, participants were emphatic that this most important, yet already beleaguered delivery-of-instruction function could not be further weakened by the cost of implementing those procedures. Costs such as those associated with administrative allowances, administrative time, financially assisted professional development, and rural compensation packages should not be directly related to the delivery-of-instruction costs. As a result, the Alberta Department of Learning should revise the current funding formula to ensure that costs associated with school-based administration do not have a direct impact on the cost of delivery of instruction to students in the schools.

Valuing the Talents of Female Candidates for the Rural Principalship

It seemed to some of the study participants that rural jurisdictions tended to value the talents of male teachers with leadership potential more than they did those of female teachers with similar leadership potential. An examination of the distribution of principals by gender during the 1999/2000 school year supported that observation. As illustrated in Table 5.1, 26% of rural principals were female, whereas 45% of their urban counterparts were female. This represents a 19% difference between the two (Ken Poon, personal communication, January 18, 2001). There appears to be a number of available candidates within the female teaching staff in rural schools. However, the difference between urban and rural female vice-principals was 15% (Ken Poon, personal communication, January 18, 2001). These figures may indicate that rural jurisdictions might already be placing greater value on the leadership talents of their female staff.

Table 5.1

Distribution of Principals and Vice-Principals by Gender

1999/2000	Rural		Urban		Difference
	n	%	n	%	
Female principals	166	26%	407	45%	19%
Male principals	478	74%	501	55%	
Female vice-principals	146	36%	405	51%	15%
Male vice-principals	264	67%	394	49%	

(Ken Poon, personal communication, March 7, 2001)

Consequently, when recruiting future rural-school principals, jurisdictions with rural schools would be well advised to consider candidates of both genders. This would likely increase the number of female appointments to rural principalships.

Increasing Access to Professional Growth Opportunities

The ability of rural-school teachers and principals to access professional growth opportunities will likely have implications for the development and the continued socialization of future rural-school principals. Participants spoke about methods of changing the work-life landscape in order to increase future rural-school principals' access to professional growth opportunities. They identified four methods related to: the isolated nature of rural schools, future principals' familial responsibility, small jurisdictions' ability to provide socialization and rural access to technology.

The isolated nature of rural schools. A number of factors deterred rural-school principals and principalship candidates from attending these courses and workshops. Some of the deterrents were discussed: personal financial burden of such professional growth programs and activities, the lack of administrative time to engage in these programs and activities, and school budget implications of attending these activities. However, others such as course/workshop location, travel distance, travel

time, time away from school, impact on a principal's family, and practicality of course offerings require analysis and changes in current practices. Universities, school jurisdictions, and third-party professional development providers should consider the quasi-isolated nature of rural schools when they offer courses and workshops. These courses and workshops should be accessible in locations outside of major urban centres, offered at a time that facilitates rural-school principals' and principalship candidates' participation, and designed so that they are relevant to the rural-school milieu.

Future principals' familial responsibility. The likelihood that many future rural-school principals and principalship candidates will have children will also have implications for their ability to access these professional growth opportunities. Universities, jurisdictions, and third-party professional development providers should design professional development programs and implement procedures that will better accommodate the needs of future rural principals with families.

Small jurisdictions' ability to provide socialization. In a related matter, human resource personnel of the smaller jurisdictions identified another concern. Although they recognized the importance of jurisdiction sponsored and led leadership developing courses, they expressed dissatisfaction with their lack of access to the finances and human resources that would allow them to offer courses similar to those offered in the larger urban and suburban jurisdictions. Agencies that contribute to the socialization of future rural-school principals within the province, such as school jurisdictions, the Alberta Teachers' Association, the College of Alberta School Superintendents, Alberta's universities, and regional consortia, should join forces to facilitate the coordination or consolidation of these disconnected and insular programs in order to provide university-accredited, rural-school applicable, and rural-school accessible principal-training courses.

Rural access to technology. The potential significance of technology in the socialization of future rural-school principals as well as the education of rural-school students was discussed by many of the participants. However, during the time of the current study, the state of technology in some of the rural areas and the prohibitive cost did not allow some rural schools to access this technology. In order to enhance access to technology driven educational opportunities, Alberta Department of Learning together with agencies responsible for the delivery of technological services to rural areas, such as Telus, should explore ways to deliver financially viable technological services to rural schools.

Further Research

Many questions were raised about equality of access, fair and equitable funding, and Alberta's commitment to providing opportunities for *every* child to receive an education suited to his/her needs regardless of where in the province the child lives. Further research will be required to examine the actual cost of the delivery of educational services, including Special Education programming, to rural students. The research should examine these costs in relation to the current demographic realities of the rural-school context and of the Alberta Department of Learning's mandated requirements for the delivery of those services. The purpose of that study would be to determine the level of funding that is fair and equitable and thereby provide equality of access for *every* Alberta student.

Discussions about differences between the school context and the work-life landscape of rural-school principals and those of their urban and suburban counterparts point to another area of potential research. What are the differences between them? What impact do these differences have on rural-school teachers and administrators?

The recent Saskatchewan study into sources of rural school principals' stress (Lam & Cormier, 1998), combined with the Ratsoy and Friesen (1985) study into occupational stress among educational personnel in an urban setting, could provide another area of potential research. These two studies could be brought together and replicated within the Alberta context to identify similarities and differences between stressors for urban, suburban, and rural principals.

To enhance a jurisdiction's ability to recruit qualified candidates for their rural school principalships, participants n the current study advocated formalising the identification of rural teachers with leadership skills. They spoke about the importance of the role of rural-school principals in this process. Further research could be undertaken to examine the role that principals could or should play in the development of future principals. What procedures are the most effective? Are there ideal strategies?

Reflections

It was the fall of 1997 when I first began this research project. At that time the number of administrative positions that would soon be available in the jurisdiction in which I was employed had personally intrigued me. I had also, as President-elect of the Alberta Teachers' Association's provincial Council on School Administration, been engaged in conversations and discussions about various provincial jurisdictions that were experiencing difficulties finding qualified principals for their schools. When I attended my first Canadian Association of Principals' (CAP) meeting, I was surprised to learn about similar difficulties in other provinces. In fact, by the fall of 1998 these difficulties had become so pronounced that the Board of Directors of CAP, of which I was a member, declared the lack of candidates for principalship positions as one of the five major national issues that would need to be studied and addressed. Jurisdictions across Canada were also experiencing difficulties recruiting teachers, which added another dimension to the administrative shortage. CAP continues to study and address

both shortages, and I am hopeful that the information presented in this study will contribute in a small way to an understanding of the complexities of this issue.

While I was completing this study, it became apparent that Alberta's education system would soon be in the throes of a significant turnover of educational staff, and some unsettling thoughts began to fester in my mind. It appeared to me that a milestone moment was on the education horizon. This occasion could be flush with exciting possibilities for positive educational change—but fraught with the potential for negative change as well. Soon there would be a considerable number of newly appointed, newly socialized principals in Alberta's schools. New blood could lead to new ideas. I began to wonder about these new leaders. In whose image would these new principals be created? Would this new group of leaders change with the times? Would the educational milieu provide them with an opportunity to grow and become more effective? Would they be what Leithwood et al. (1999) conceived as the transformational or even posttransformational leaders of tomorrow? Or would they gravitate toward exercising the power of position? Would collegial, collaborative reasoning go by the wayside? I hoped not!

Another notion that had been bothering me was my perception that one of my fundamental assumptions might be wrong! School jurisdictions in Alberta might not continue to operate their rural schools. When I spoke with participants and had further dialogue with acquaintances—other rural-school teachers and administrators—it became apparent that most, perhaps all, of rural-school principals seemed to be struggling to keep their schools viable. They were having difficulty in offering their students the quality of education that was consistent with their own conception of education program, and balancing that with community expectations, provincial funding, and programming requirements. They seemed caught between the proverbial "rock and a hard place." If the Alberta government were to carry on in its current direction and continue to base funding and program delivery decisions on economic

efficiencies (urban reasoning), rural schools *would* close. On the other hand, if they changed funding and program delivery decisions to reflect the demographic realities of rural areas, they might not close. Perhaps this would be another potential milestone moment.

Throughout the preparation and writing of this dissertation, I have received queries about the nature of the study and its relationship to elementary education. Some people indicated that the study appeared to be more suited to being conducted within the Department of Policy Studies rather than the Department of Elementary Education. I disagree. This study has focussed on the principalship of Alberta's rural schools. These schools are frequently configured as multidivision schools. When these multidivision rural schools contain elementary divisions, as is often the case, a majority of the students attending the schools are in the elementary grades. Principals in these schools cannot remove, using a modification of Debono's hat metaphor, their elementary hat and put on their administrative (policy studies) one. Nor can they remove their Special Education, junior high, and high school hats. They must wear all of the hats at once. Decisions by future multidivision rural-school principals will have considerable impact on the quality of education for all students in their schools. These decisions will, however, have a significant impact on students during their foundational elementary years.

Finally, my personal quest to achieve a Doctor of Education degree began upon completion of my Master of Education degree. The energy, enthusiasm, and camaraderie of the master's experience will not be forgotten. However, the opportunity to embark on the education doctorate studies at the University of Alberta became available only four years ago—14 years after completion of my master's degree. In the past I was unable to enroll in the program because of the financial implications of the residency requirements. I, as well as others, could not afford one or two years away from our assignments and forego income somewhere between $40,000

(if we were lucky enough to receive an educational leave grant) and $70,000 per year. Doctorate programs with different, more accessible residency requirements were available through numerous universities in the United States, but because of the cost of tuition, they were also far too expensive to consider. However, thanks to some forward-thinking people, a pilot program which defined the residency requirement differently—completing 24 credits in two years—was implemented at the University of Alberta. I felt fortunate to be accepted as a member of one of the two doctoral cohort groups. I was especially fortunate to have been in a position to be on campus as a full-time student during the final stages of completing the requirement for this degree. Being a part of the Doctoral Cohort experiment has been an interesting, valuable, and collegial experience. I'm glad I was able to take the journey!

A Concluding Comment

All of these implications and recommendations will likely have an impact on the recruitment, socialization, and retention of future rural-school principals. Adhering to all or any of them, though, will not guarantee that jurisdictions will be able to fill their rural-school principalship positions with qualified people. Many personal factors provide an infinite number of combinations of circumstances that will lead to the success or failure of any strategy that is designed to find, prepare, and keep principals in rural schools. However, addressing the issues raised and implementing the recommendations presented is likely to increase the probability that rural schools will continue to find qualified leaders. Not implementing any of them, on the other hand, is likely to decrease the probability that sufficient qualified leaders for our rural school will be found.

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APPENDICES

APPENDIX A: PHYSICIANS' DECISION FACTORS

Community Factors

1. personal preference for living in a non-urban community
2. availability of appropriate housing
3. proximity of recreational/shopping facilities
4. proximity of cultural/religious centres
5. distance from major urban centres
6. job opportunities for spouse and other dependants
7. closeness of friends and family
8. ability to become/remain involved in hobbies/avocations/volunteer activities

Market Factors

1. supply of family physicians and specialists in Alberta urban and specific rural centres
2. availability of other urban or rural practice opportunities in other provinces or countries
3. immigration patterns/availability of foreign-trained physicians

Business Factors

1. fee-for-service payment schedules and projected income levels
2. degree of which hours of work can be controlled
3. availability of incentive payment programs
4. availability of out-of-reach programs, rural residency training and locum tenens services
5. community recruitment programs, including bursary and scholarship programs
6. cost and time to establish practice, on-going operating costs
7. level and type of overhead costs
8. ability to purchase existing practice(s) or enter an existing partnership
9. ability to follow career path/availability of additional training
10. scope of practice (level of challenge, variety of procedures, variety of patient conditions)
11. availability of hospital privileges

Medical Community Factors

1. opportunity for independence/availability of consultation
2. number and type of other medical practitioners in and around the community
3. time off for continuing medical education
4. on-call and cover-off requirements
5. physician/population ratio
6. proximity of professional organizations
7. overall management of the regional health system in the remote or rural area
8. working relationship between medical community, facility staff, and broader community
9. distance to closest hospital or clinic with acute care and emergency services
10. availability of ancillary health professions, including chiropractic, Pharmaceutical, podiatric, dental and other ancillary professions
11. opportunity for/availability of laboratory and research facilities
12. type and availability of emergency/trauma/long term care, ambulance services
13. opportunity for involvement in health system planning/outcome measurement at the community and regional levels

Informational Factors

1. knowledge of available opportunities
2. knowledge of Rural Physician Action Plan initiatives and components (MacDonald and Associates [1996] p. 19, 20).

APPENDIX B: COVER LETTER

Dear Participant:

An analysis of the demographics of school-based administrators in Alberta indicates that a large number of today's school leaders will be eligible to retire in the very near future. Specifically, within the next thirteen years approximately 90% of principals and 80% of vice-principals will have reached the age of fifty-five (Alberta Education Information Services) and may be decide to retire. As more and more teachers and administrators are choosing to retire, School Boards will face a considerable shortage of experienced teaching and administrative candidates to fill the many school-based administrative positions that such projections indicate will become available. This phenomenon will likely require school jurisdictions to hire a large number of novice principals in the near future. Where will they come from? How will they be recruited? How will they be "groomed" to assume the educational leadership and administrative duties? Once in place, how will these new educational leaders be encouraged to remain in administration and remain within their jurisdictions?

The purpose of this study is to identify and describe possible recruitment, socialization and retention strategies in order to ensure that Alberta rural schools continue to enjoy effective instructional and administrative leadership. In simple terms, I would like to find out what *you* feel will be required for rural districts to find, prepare and keep their principals.

I believe that active school leaders are in the best position and have the most appropriate knowledge to accurately describe needed recruitment, socialization and retention strategies. Consequently, I would ask that you consider taking part in this study. The study will consist of two 45 - 60 minute interviews. Interviews will be recorded and transcribed to text. Should you wish, you will have the opportunity to listen to the recorded interview and/or examine the transcribed text for their authenticity. For your information, the interview questions are attached.

Finally, I would like to take this opportunity to inform you that all information you provide will be maintained in strict confidence. If you are willing to participate in this research, please complete and return the attached demographic questionnaire and research consent form. Your signature on the consent form indicates that you have read the information provided above and have given permission to participate in the study. If you have any questions, please call me at my office, collect at home or email me at the email address provided below. Thank you.

Yours sincerely,

Carl McColl
(780) 436-6304 (home)
(780) 492-4273 (office)
mccoll@ualberta.ca

APPENDIX C: RESEARCH CONSENT FORM

I, _____ , hereby consent to be interviewed and tape-recorded by Carl McColl.

I understand that:

1. I may withdraw from the research at any time without penalty
2. all information gathered will be treated confidentially
3. any information that identifies me will be destroyed upon completion of this research
4. I will not be identifiable in any documents resulting from this research

I also understand that the results of this research will be used only in the following:

1. research thesis
2. presentations and written articles for other educators

_____
Signature

_____
Date signed:

For further information concerning the completion of this form, please contact Carl McColl by telephone at the University (492-4273, extension 293) or at home (436-6304) or by email at mccoll@ualberta.ca.

APPENDIX D: DEMOGRAPHIC DATA

Recruitment, Socialization, and Retention of Principals

Demographic Data: Name: _____

Experience: As a classroom teacher without administrative assignment.

Levels: (specify years)

K-6	_____	K-9	_____
K-12	_____	7-9	_____
7- 12	_____	10-12	_____
Other	_____		

Experience: As a vice-principal.

Type of school: (specify years)

K-6	_____	K-9	_____
K-12	_____	7-9	_____
7- 12	_____	10-12	_____
Other	_____		

Experience: As a principal.

Type of school: (specify years)

K-6	_____	K-9	_____
K-12	_____	7-9	_____
7- 12	_____	10-12	_____
Other	_____		

Were you ever a principal in another district? Yes No

Was achieving the principalship a part of your career plan? Yes No

When did you reach the decision to become a principal?

Prior to initial teacher preparation program _____
Within the first 10 years of teaching _____
After 10 years of teaching _____
After appointment to vice-principalship _____

Current Assignment

Type of school: _____ Student population _____

Professional staff FTE _____ Other staff _____

APPENDIX E: INTERVIEW QUESTIONS

First Interview Questions

(BP = beginning principals, SR = senior principals, HR = human resource officers)

BP & SP - How did you come to be a principal?
HR - How did you come to be a human resource officer?

What do you think could be done to encourage qualified applicants to apply for rural principalships?

BP - What did you do to prepare for your new position?
SP & HR - What did you do to prepare for your most recent position?

BP & SP - What did district personnel do to help prepare you for your new assignment?
HR - What does your jurisdiction do to prepare principals for their new assignments?

What do you think would help teachers, who have the potential, to become future rural principals?

What do you think will be needed to help principals, new to a rural school, understand the nature of the position?

BP & SP - What is your jurisdiction currently doing to help you with your role as principal?
HR - What is your jurisdiction currently doing to help your principals with their role as principal?

In the future, what might be done to assist rural principals with their role as principal?

BP & SP – Why do you stay with your school and your jurisdiction?
HR – What does your district do to encourage its rural principals to stay with their schools for a reasonable period of time?

What might help future principals remain within rural schools and/or rural jurisdictions for a reasonable period of time?

Second Interview: Cover Letter and Questions

Dear Participant:

After analyzing the insights of the first interview, the following broad themes have emerged:

1. The ability to recruit and retain future rural principals will likely be directly related to a jurisdiction's ability to make the rural principalship an attractive position for teachers.
2. Recruiting teachers with a positive predisposition toward rural schools will likely facilitate better socialization and may encourage rural principals to stay for a reasonable period of time.
3. In order to be successful, future rural principals will require considerable preservice and inservice professional development, socialization and training; and a supportive learning-community environment will likely be ideal for these learning experiences.
4. The professional work-life experiences of rural-school principals are both onerous and unique, and will likely have a direct effect on a jurisdiction's ability to recruit, prepare/socialize and retain future rural-school principals.
5. The principal of a rural school containing elementary grades encounters unique and challenging experiences.

Making principalship attractive
Appeal of the rural culture
- community, school, jurisdiction

Intrinsic incentives
- being valued
- opportunity to network
- career opportunities

Extrinsic incentives
- admin allowance
- admin time
- school funding allocation
- financially assisted PD
- travel considerations
- others

Viability of rural schools
Family life and work life balance
Viability of rural schools
Family life and work life balance

Positive predisposition
Recruit rural teachers
Knowledge of the rural culture
- community, school, jurisdiction

Family considerations
- spouse
- children
- extended family
- location of home

Preparation/socialization/ training

Preservice
- personal desire
- teacher overt encouragement
- teacher leadership opportunities

Leadership training
- university undergraduate
- university postgraduate
- other experiences
- district programs
- other teacher PD opportunities

Inservice
Orientation programs
Mentoring opportunities
Leadership training
- university postgraduate
- district programs
- other growth opportunities

Learning community environment
Opportunity to network
Opportunity for valued input
Supportive climate
Connectedness, collaboration

Professional work-life
Lack of adequate resources
Teaching/administration conflicts
Leadership/management conflicts
Curricular responsibilities
Community, parent, student
Time management conflicts
Staffing responsibilities
Teacher evaluation requirements
District responsibilities
Special Education
Site-based budget requirements
Declining enrollments
Technological influences
Timetabling responsibilities
Multi-level responsibilities

Elementary grades
Combined classes
Special Education programming
Attitudinal uniqueness
Curricular/instructional uniqueness
Multi-level schools
- Secondary/elem conundrum
- Discipline differences

For your information, I have enclosed my interpretation of our conversation as well as a listing of topics introduced by other rural administrators during the first interview. During our next interview, I would like to explore the following:

1. Is my understanding of our conversation correct?
2. Since our first interview, are there any things that you would like to add or alter to what you have already mentioned?
3. Do the emerging themes, as I see them, fit with your knowledge and experience of rural school administration? Any comments?
4. Would you like to comment on any of the topics that were introduced by others?

APPENDIX F: MEMBER CHECK

Cover Letter

March 2, 2001

Dear Participant:

Enclosed with this email is a copy of the three chapters of my dissertation that report the information you provided during our interviews. Please read the three chapters and advise me if my understanding of our conversations is correct. Is there anything you feel uncomfortable with?

You will notice that you, your school, your town and the school jurisdiction you work for have been given a pseudonym. Also, as far as possible, information about you, your school, your town, and the jurisdiction you work for has been presented in as general a manner as possible to reduce the likelihood that you can be identified. This is standard practice for this kind of research.

Please read the chapters carefully. For your information, I have highlighted the places where I have referred to our conversations. A report form is attached which will allow you to respond. Please indicate your approval by emailing the completed form, or by including in the text of your email language that is similar to that used in the report form. It is important that I get approval from each participant. Should you have any questions please do not hesitate to contact me by telephone or email.

Finally, would you please dispose of the document after you have read it, as it is possible that a participant would like to have changes made. I will send a summary of the document when it has been defended.

Once again thanks for you cooperation,

Yours sincerely,

Carl McColl
mccoll@ualberta.ca
780 436-6304 (after 6 p.m.)

Report Form

To: Carl McColl

Re: Dissertation member check

From: _____

I have read the material from Chapters 4, 5 & 6.

☐ I do not have any concerns with the material.

☐ I have concerns - they are as follows:

Comments:

Date: _____